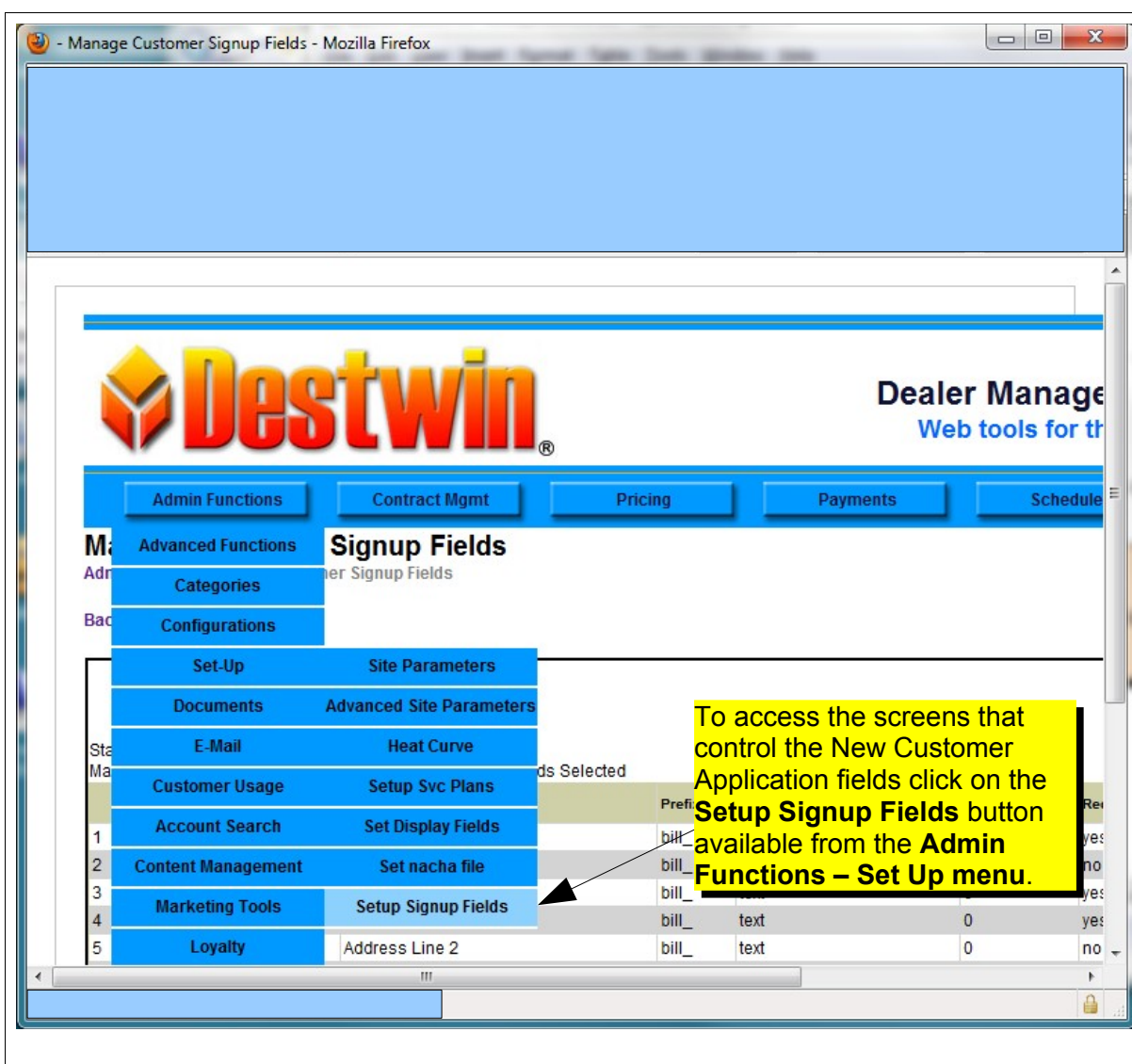


Destwin® Quick Reference Guide
Console Version 2.1
How to Set Fields on the New Customer Application page
23-DEC-11

This help document describes how to create and organize the fields on the New Customer Application page. Generally Administrator access is required to set up or edit this page.

Important

Certain fields may be sensitive and require encryption. Please contact Destwin for additional information or questions.



Manage Customer Signup Fields

[Admin Home](#) > Manage Customer Signup Fields

[Back to Previous Page](#)

- [View Help](#)
- [Add New Customer Signup Record](#)

Status:

Manage Customer Signup Fields: No Customer Signup Fields Selected

	Name	Label	Prefix	Type	Value	Required?	Display?	Display Order	Delete
1	first_name	First Name	bill_	text	0	yes	yes	↓	
2	middle_initial	Middle Initial	bill_	text	0	no	yes	↕	
3	last_name	Last Name	bill_	text	0	yes	yes	↕	
4	address_1	Address Line 1					yes	↕	
5	address_2	Address Line 2					yes	↕	
6	city	City					yes	↕	
7	state	State	bill_	dropdown	0	yes	yes	↕	
8	zipcode	Zipcode	bill_	text	0	yes	yes	↕	
9	home_phone	Home Phone	bill_	text	0	yes	yes	↕	
10	work_phone	Work Phone	bill_	text	0	no	yes	↕	
11	email	Email Address	bill_	text	0	yes	yes	↕	
12	tank_size	Tank Size	tank_	tank_size	0	yes	no	↕	
13	tank_amount_left	Amount of fuel left in tank	tank_	tank_amount_left	0	yes	no	↕	
14	tank_info	Tank Information				yes	yes	↕	
15	tank_fill_location	Tank Fill Location				no	yes	↑	

TABLE: info_customer_signups_fields

To add a new field, click on the:

[Add New Customer Signup Record](#) link.

To change the position of a field, use the up or down arrows for that field to move it up or down.

To edit an existing field, click its [Name](#).

Sample New Customer Signup Fields page.

Create Company Service Record

[View Documentation](#)

Create Service Plan Record - ID: , Name: , Code:

Name

Label

Prefix (don't use bill_ or tank_)

Type

header

Value

Is Required

Display on Customer Signup Form?

Store this field?

[Close Window](#)

New Field Setup page

Enter a unique descriptive name without spaces for the database field name. This field is not displayed to the customer.

The Label field contains the content that will appear on the form on the web site.

Enter the Prefix field. The Prefix field is used for internal purposes within the database. You may use the Prefix field to help organize your data, e.g. for fields associated with delivery information you might want to use 'del_'. The Prefix field should end with '_'. Destwin reserves 'bill_' and 'tank_' for its own purposes, do not use these.

Create Company Service Record

[View Documentation](#)

Create Service Plan Record - ID: , Name: , Code:

Name

Label

Prefix (don't use bill_ or tank_)

Type

header

header
text
textbox
yesno
dropdown
radio
checkboxes
password
tank_fill_location
tank_size
tank_amount_left
tank_information

Value

Is Required ☐

Display on Customer Signup Form? ☐

Store this field? ☐ Yes ☒ No

[Close Window](#)

Done

Field Type options

Type	Description	Value reqd.
Text Input Fields		
header	use to place title type label on the site, no input from customer is required.	No
text	single text box entry field, use for things like customer first name.	No
textbox	multi-line text box entry field, use for things like comments.	No
Selectable Option Fields		
yesno	yes or no selectable radio button field, use for fields that require a Yes or No selection.	No
dropdown	use to set a limited list of options for the customer to choose from a drop down list, choices are separated using the vertical bar key (), e.g. own rent. Only one item may be selected from the list.	Yes

radio	use to set a limited number of options selectable as a radio button, choices are separated using the vertical bar key (), e.g. own rent. Only one item may be selected from the list.	Yes
checkboxes	use to set a limited list of options for the customer to choose from a list, choices are separated using the vertical bar key (), e.g. #2 Heating Oil Propane Kerosene. Multiple items may be selected from the list.	Yes
Reserved for Destwin Use		
password	for password fields only – generally reserved to Destwin use. Contact Destwin for more information or questions.	N/A
tank_fill_location	for tank fill location only – generally reserved to Destwin use. Contact Destwin for more information or questions.	N/A
tank_size	for tank size only – generally reserved to Destwin use. Contact Destwin for more information or questions.	N/A
tank_amount_left	for amount left in tank only – generally reserved to Destwin use. Contact Destwin for more information or questions.	N/A
tank_information	for tank information only – generally reserved to Destwin use. Contact Destwin for more information or questions.	N/A

Create Company Service Record

[View Documentation](#)

Create Service Plan Record - ID: , Name: , Code:

Name

Label

Prefix (don't use bill_ or tank_)

Type

Value

Is Required ☐ Yes ☒ No

Display on Customer Signup Form? ☐ Yes ☒ No

Store this field? ☐ Yes ☒ No

[Close Window](#)

New Field

For fields that require a **Value** (see table above) enter that in the **Value** field.

Set **Is Required** field to Yes or No, Yes makes the field required for the customer to submit the form.

Set the **Display on Customer Signup Form** to Yes to include the field on the New Customer Application form.

Set the **Store this field?** Field to Yes to save the entry.

Be sure to click on the **Submit** button when done.

Sample Form

The form is titled "DELIVERY & BURNER SERVICE" and contains the following fields and sections:

- Employment Status:** Radio buttons for "Full time" and "Part time".
- Fuel Type:** Checkboxes for "#2 Heating Oil" and "Propane".
- Method of Delivery:** Radio buttons for "Automatic (Preferred)" and "Will-Call".
- Tank Size (Fuel Oil):** A "Select One" dropdown menu.
- Tank Size (Propane):** A text input field.
- Please list additional tanks:** A text input field.
- Tank Location:** A "Select One" dropdown menu.
- Fill Pipe Location:** A "Select One" dropdown menu.
- Last Year Usage:** A text input field.
- Number of Floors:** A text input field.
- Number of Residents:** A text input field.
- Domestic Hot Water Heated With:** Checkboxes for "Fuel Oil", "Natural Gas", "Propane", "Electric", and "Other".
- Type of heating and hot water equipment:** A "Select One" dropdown menu.
- Previous fuel supplier:** A text input field.
- Directions/House Description/Special Instructions:** A large text area.
- Would you like a service contract?:** Radio buttons for "Yes" and "No".
- SMART MONEY:** A section header.
- I'd like to enroll in the price protection plan when offered:** A checkbox for "YES!".
- Choose one plan:** Checkboxes for "Price Cap", "Price Fix", and "Pre Buy".
- OPTIONAL:** A section header.
- I authorize you to charge my credit card for the following services:** Radio buttons for "Fuel Oil Delivery", "Burner Service", and "Both".

Yellow boxes with arrows point to the following field types:

- header type field.** Points to the "DELIVERY & BURNER SERVICE" title.
- text type fields.** Points to the "Tank Size (Propane)" and "Please list additional tanks" text input fields.
- dropdown type fields.** Points to the "Tank Size (Fuel Oil)", "Tank Location", and "Fill Pipe Location" dropdown menus.
- checkboxes field value, five items separated by | key.** Points to the "Domestic Hot Water Heated With" checkbox group.
- textbox type field.** Points to the "Previous fuel supplier" text input field.
- yesno type field.** Points to the "Would you like a service contract?" radio buttons.
- radio field value, three items separated by | key.** Points to the "I authorize you to charge my credit card for the following services" radio buttons.

Activating Your Form

Systems may be set to use a default form that does not use the Setup Signup Fields setting or the form that you create using the Setup Signup Fields. Enabling or disabling the form you create is controlled through a Configuration named **Willcall_Mode**. Set this Configuration to **advcreditapp** to enable your form or **creditapp** to enable the default form. See the help document named **How to Edit a Configuration** for more information on how to edit a configuration.