



SETTING UP CUSTOM FIELDS

Enable Custom Fields

To switch this feature on in the app go to:
Settings > New and Beta Features > Custom Fields

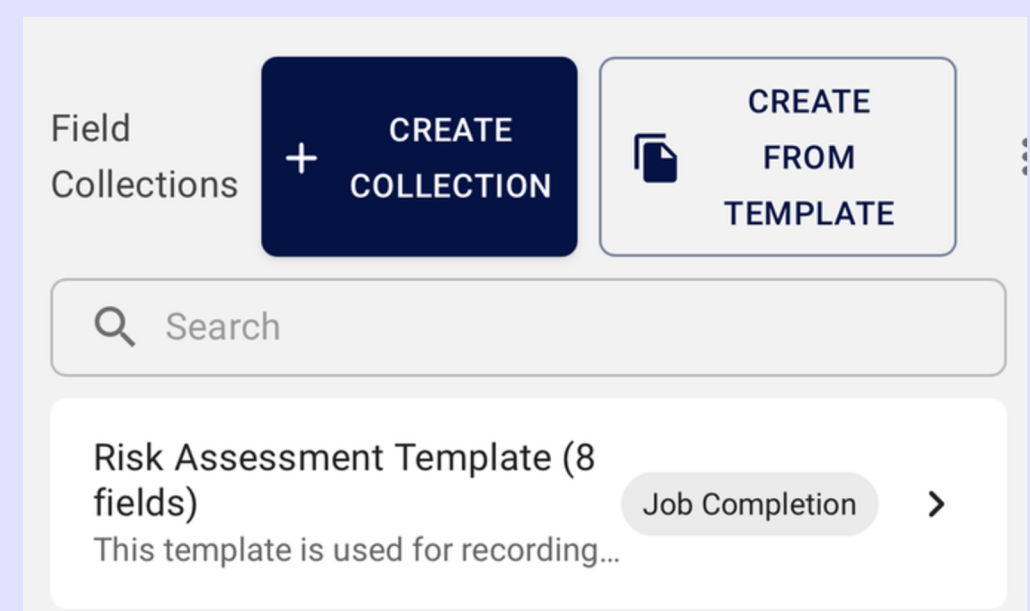
1. Creating Custom Collections & Fields

Choose a **Standard Template** from the list or create your own **Custom Template**

Choose where you want the form to sit

To make a custom template click **Create Collection** then select a **Target** this will determine where the template will be stored and completed.

Eg. Upon Job completion.



Attach to anything - The form can be attached to any of the following:

Customers

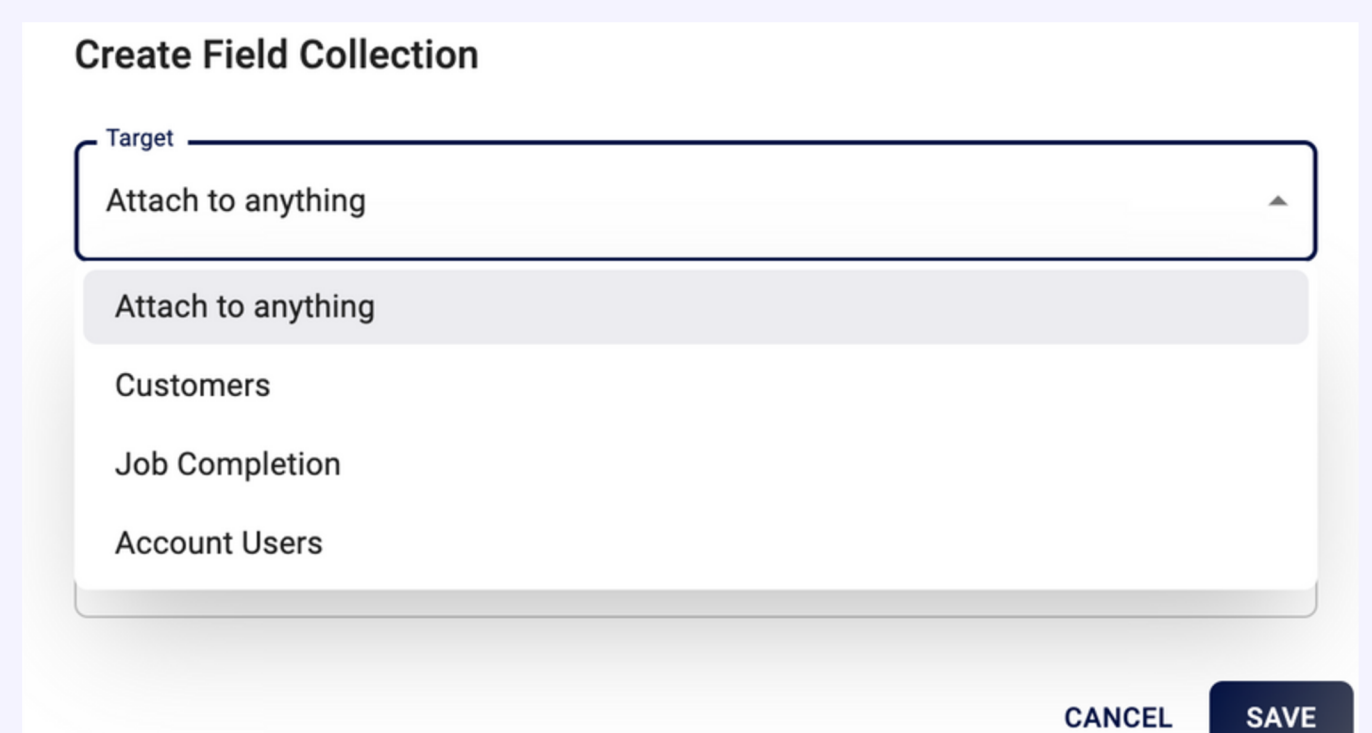
The form can be added to the **Customer profile** perfect for adding extra information. (Not visible to a customer)

Job completion

The form will be added to the **Job** and filled in when the job is completed eg a checklist or signature.

Account Users

Added to a **User** eg. HR information



Create a **Field** or **Clone an existing** one

Edit Field

Type

Checklist Item

Checklist Item

Text Field

Signature

Attached File or Image

Number

Select

Optional

Allow this field to be skipped

Field is active (show on forms)

Additional Settings

CANCEL

SAVE

Additional Settings include the option to add further customisations to the field eg. a prefix or suffix to a number.

Select a **Checklist Item**

This specifies the type of field that will appear on your form.

Fill in the **Name** and any **Instructions** for the person filling in the form.

You can choose to allow **additional notes** to be added only when the item is left empty, or request them to be added at all times.

Toggles can be switched on to allow the field to be **skipped** and make it **active**.

2. Enabling Custom Fields on individual Customers, Jobs and Users

Adding the form to a **Job**.

Open a **Job > edit job**, scroll down and click **Custom Fields**.

Select the form you'd like to add.

Required Skills

Select required skills

Details

Notes

#sample-data

Job Notes for Invoice

Add notes

Custom Field Events

Job Completion

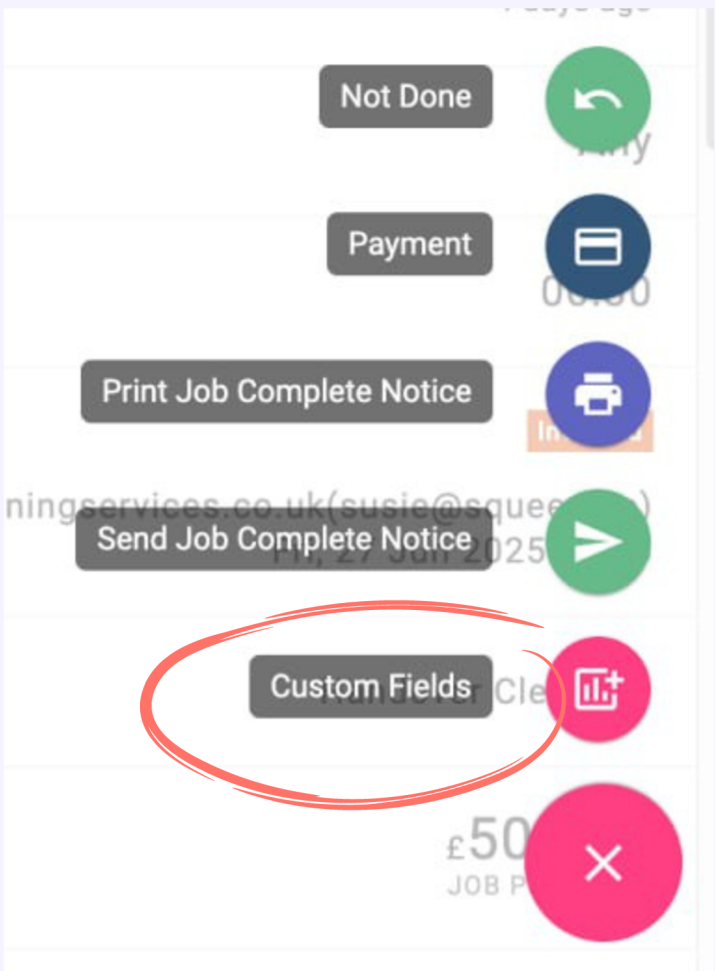
SAVE

Risk Assessment Template

feedback for client

External Van Checklist Template

Once jobs are completed you can view the form by selecting the **Custom Fields** button in the job screen



Attach Custom Fields
Custom fields you attach will be available to complete on the customer form >

Marketing Accepted

NO YES

You must ensure you have obtained permission to send marketing information in accordance with your local laws.

Adding the form to a **Customer**

Open the **customer profile**, click **edit**, scroll down to **Attach Custom Fields** and choose the template you want to attach.

User Day Start Time
The time at which the user starts working >

Worker Availability
Set the default availability of this worker >

User Skills
Add and remove skills for this user >

Attach Custom Fields
Attach fields to this item >

User Fields

Adding the form to a **User**

Go to **User** in the menu, click on the users name, scroll down to **Attach Custom Fields** and choose your template.

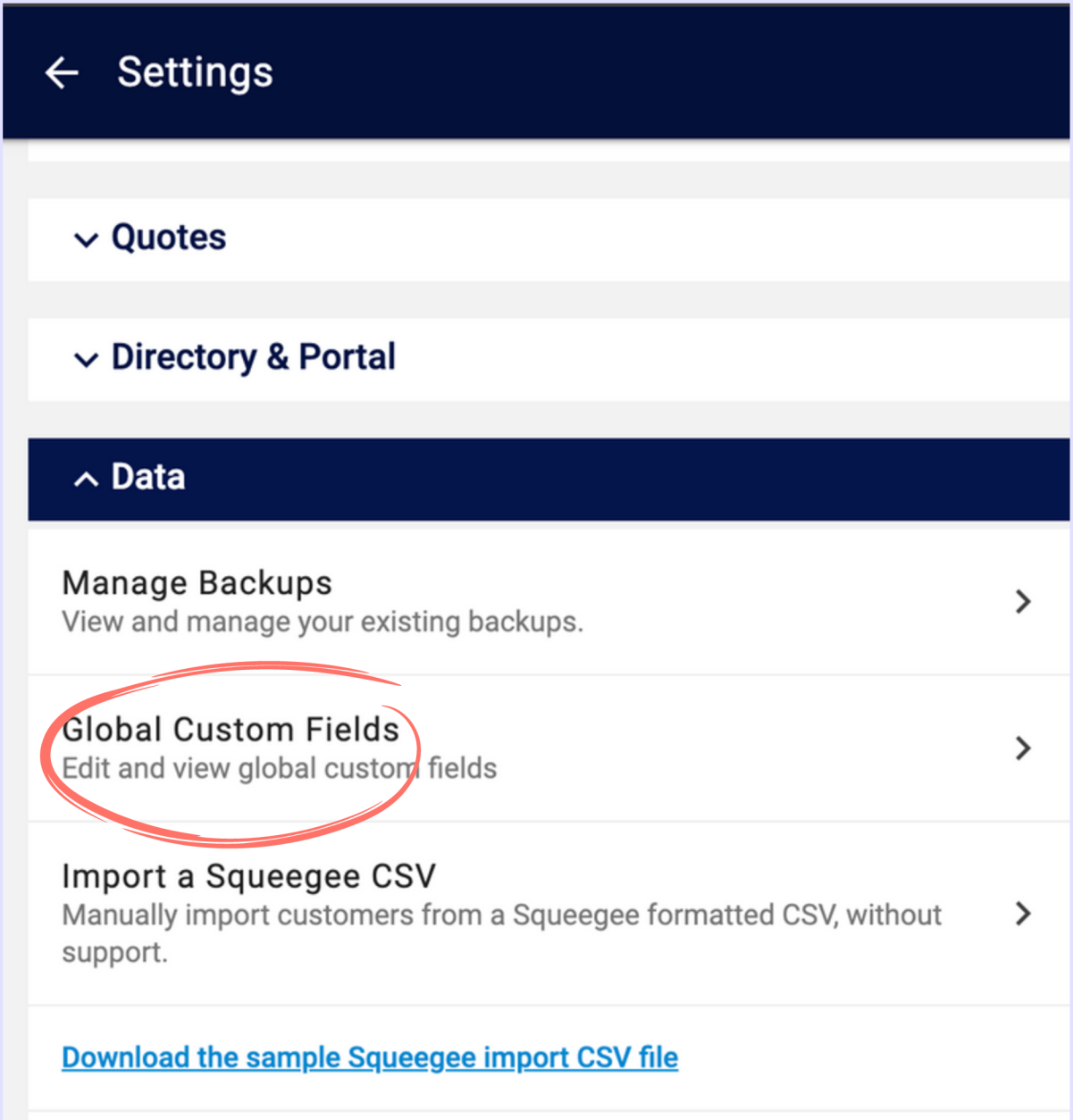
3. Enabling Custom Fields Globally

Adding forms globally means they will appear on every customer, user or job completed.

Go to **Settings > Data > Global Custom Fields**

Select the target of the custom field you would like to enable globally. Either **Account Users**, **Job Completion** or **Customer**

Save. You can add others in the same way.



4. Send forms to customers once completed.

Go to **Customer > Edit Customer > Attach Custom Fields** and select the form you want to add.

This will be attached to the invoice when it is emailed to the customer. Forms are also saved

Job prices for this customer will be shown to workers and planners according to global account setting, currently "SHOW"

Require Signature

DEFAULT NO

YES

NO

Currently set to **Default (no)** so jobs for this customer **will not** require a signature

Attach Custom Fields

Custom fields you attach will be available to complete on the customer form

>

Marketing Accepted

NO

YES

You must ensure you have obtained permission to send marketing information in accordance with your local laws.

5. To view all forms

Go to **Reporting** on the main menu
Click on **Type** and filter by **Custom Fields**

CUSTOMERS	JOB	FINANCIALS
Reports are saved for five minutes showing the same data during this time.		
		Details
Type		<div><div>✓ Type (All)</div><div>Automation (5)</div><div>Custom-Fields (1)</div><div>Customer (11)</div><div>Export (12)</div><div>Financial (6)</div><div>Job (10)</div><div>Time (3)</div></div>
		<i>i</i>
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