



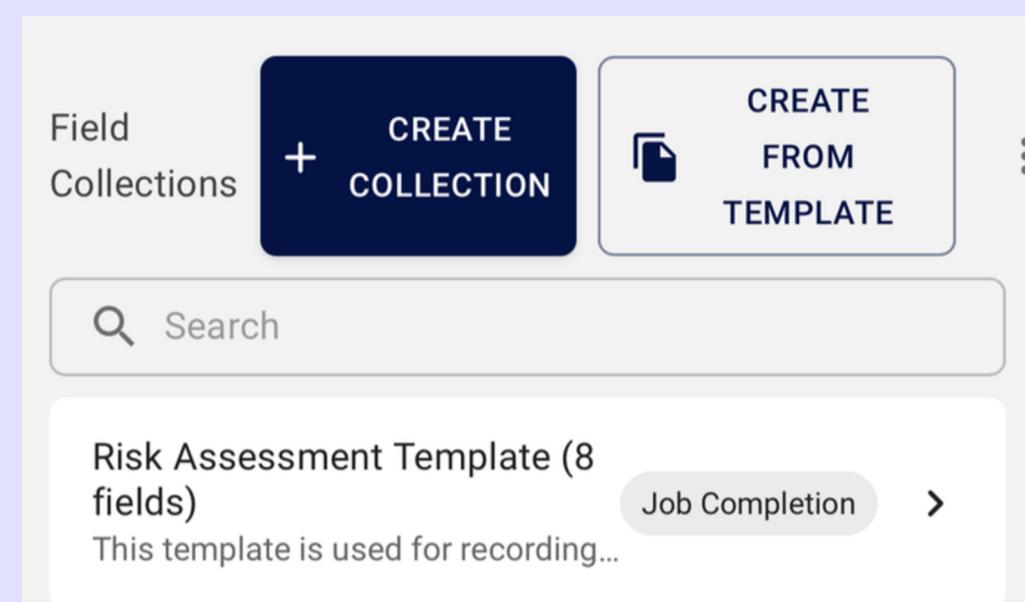
SETTING UP CUSTOM FIELDS

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

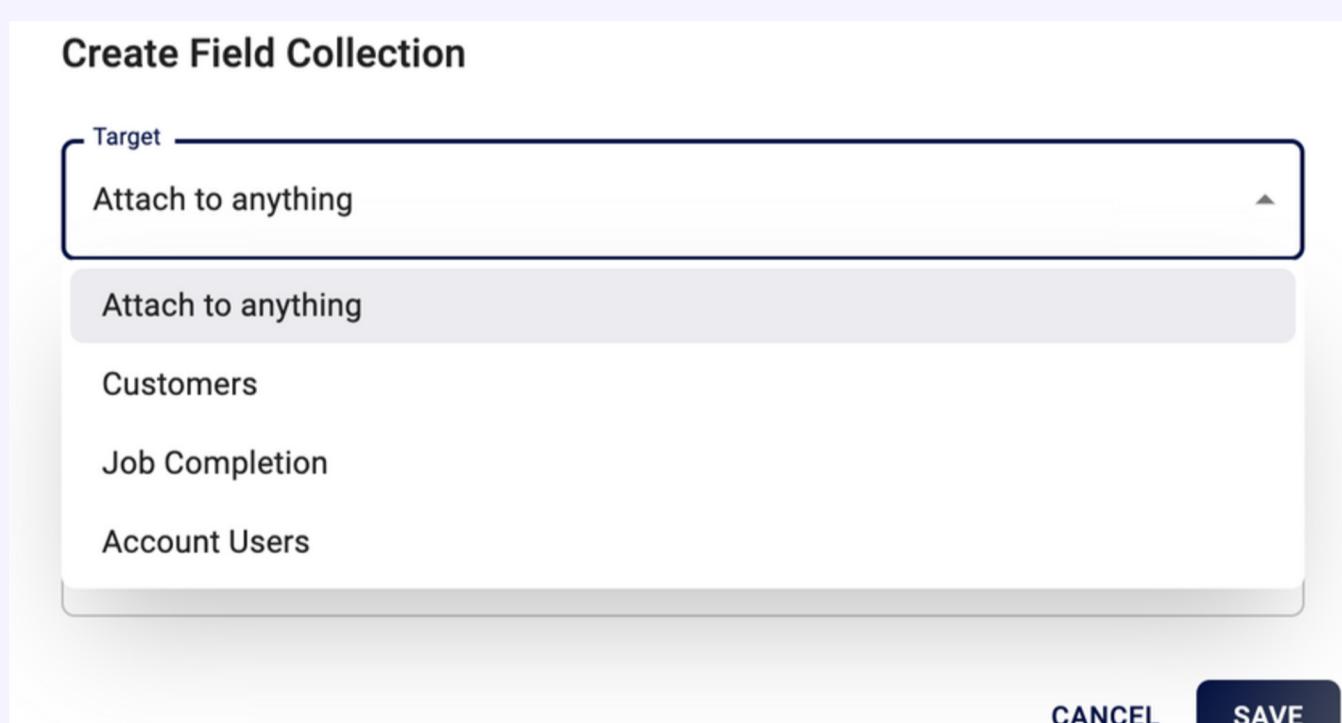
The form can be added to the **Customer profile** perfect for adding extra information. (Not visible to a customer)

Job completion

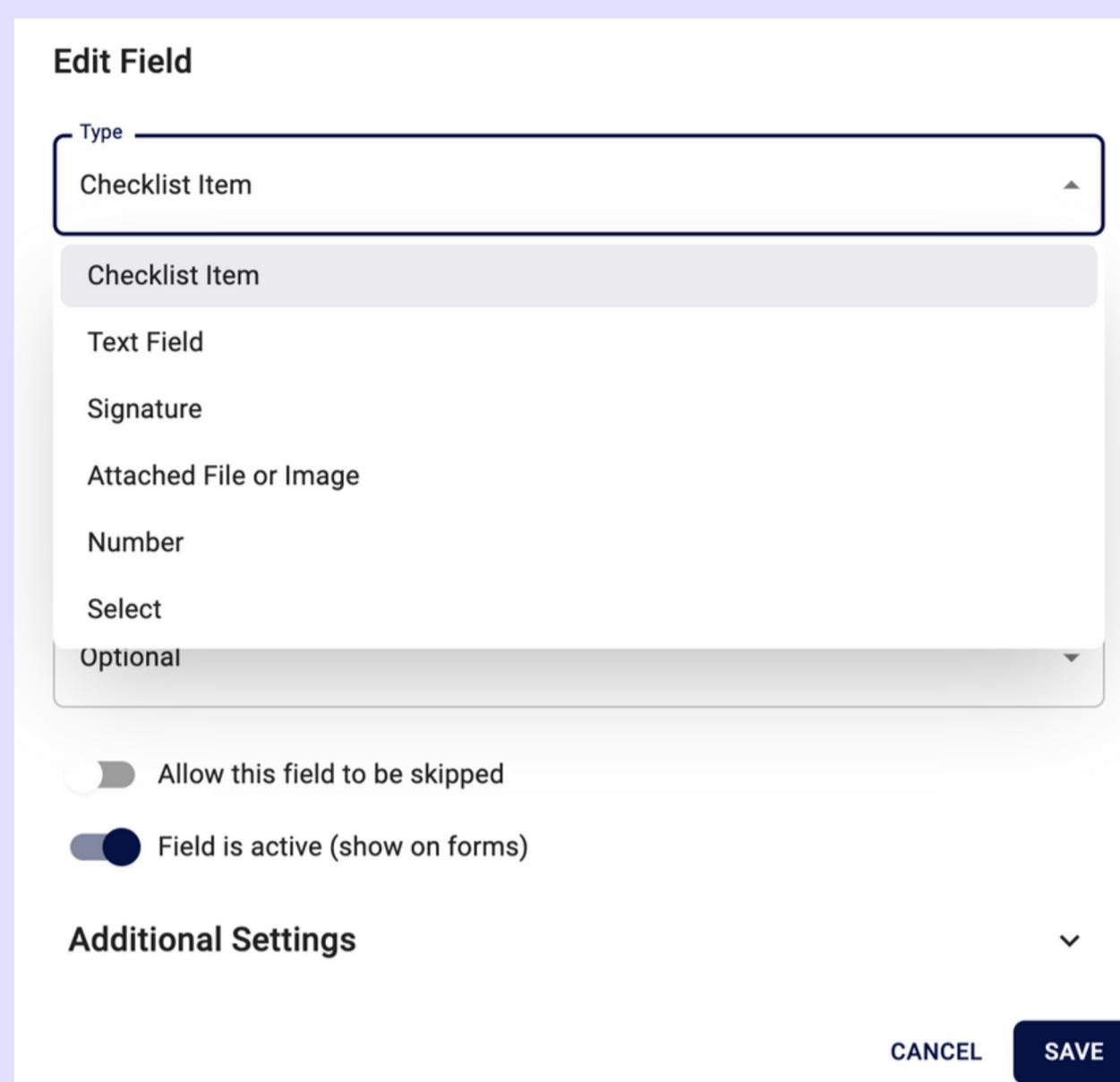
The form will be added to the **Job** and filled in when the job is completed eg a checklist or signature.

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

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.

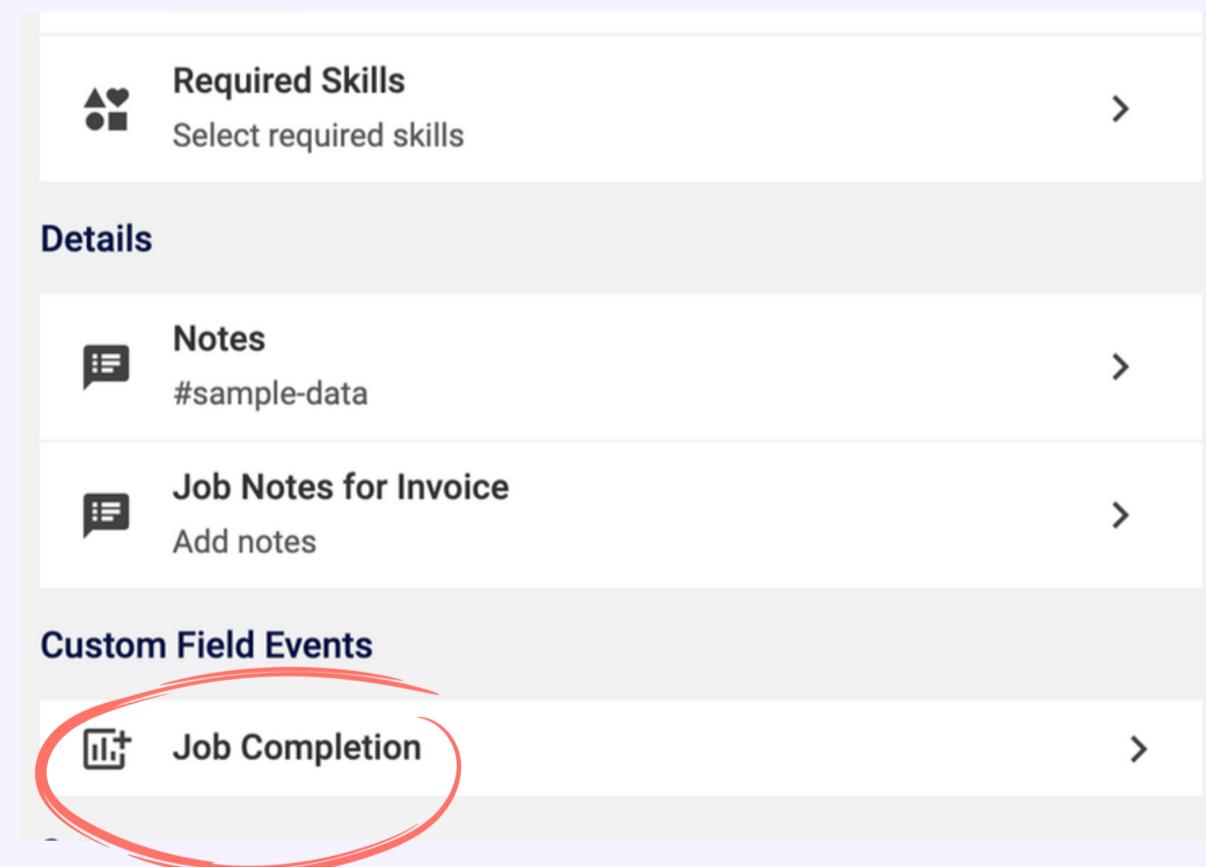
Toggles can be switched on to allow the field to be **skipped** and make it **active**.

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

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**.



Required Skills

Select required skills

Details

Notes

#sample-data

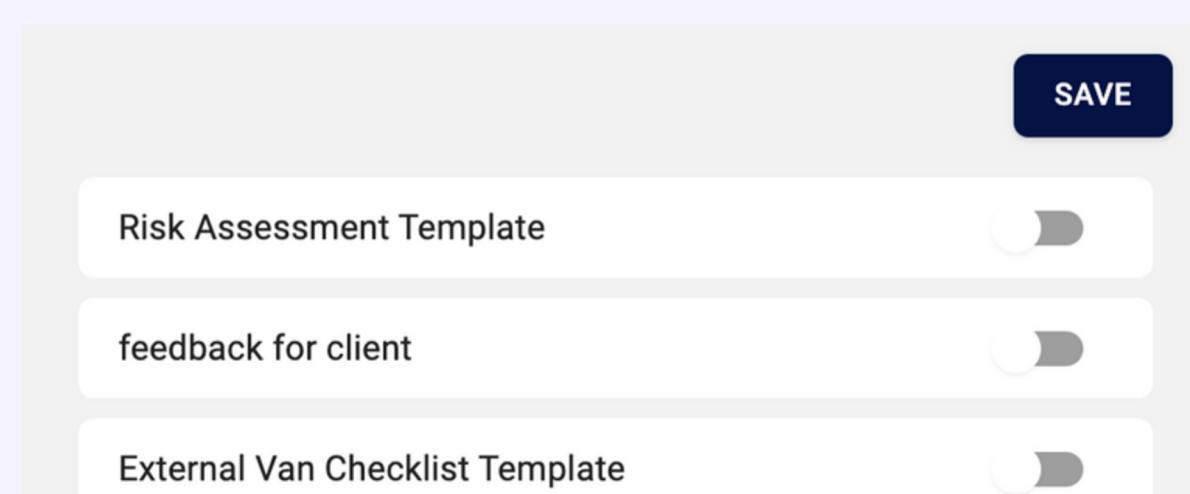
Job Notes for Invoice

Add notes

Custom Field Events

Job Completion

Select the form you'd like to add.



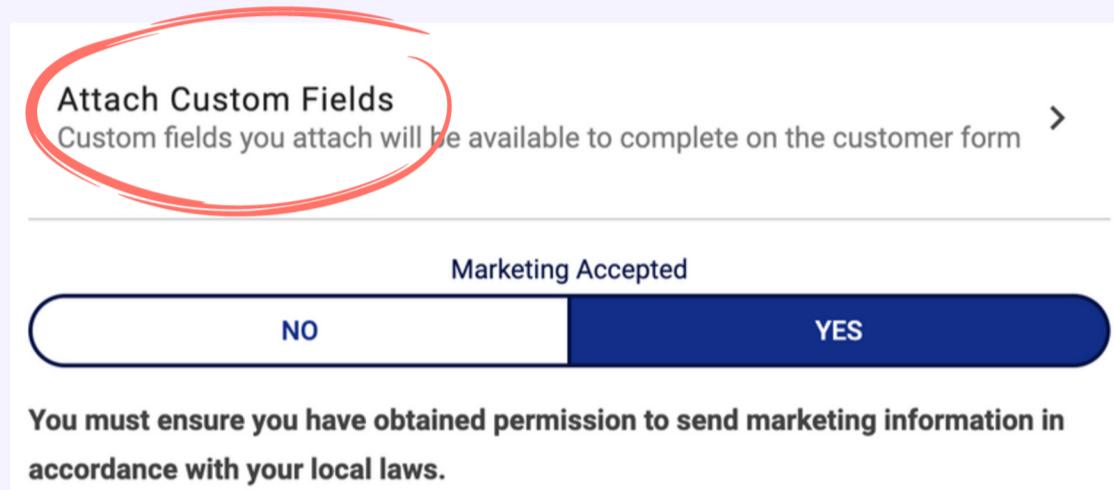
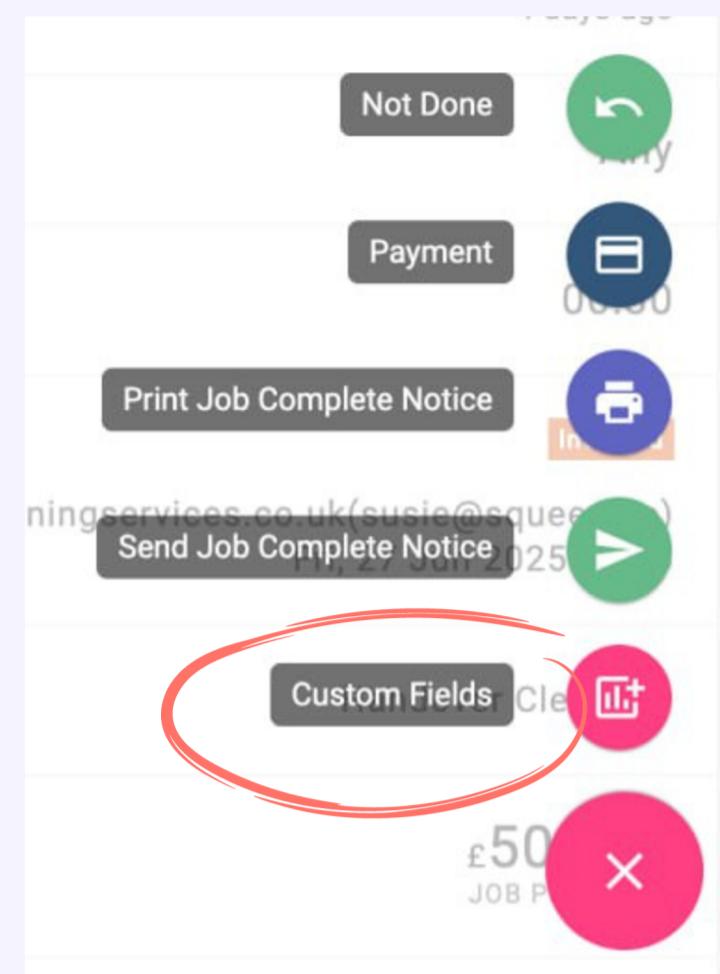
Risk Assessment Template

feedback for client

External Van Checklist Template

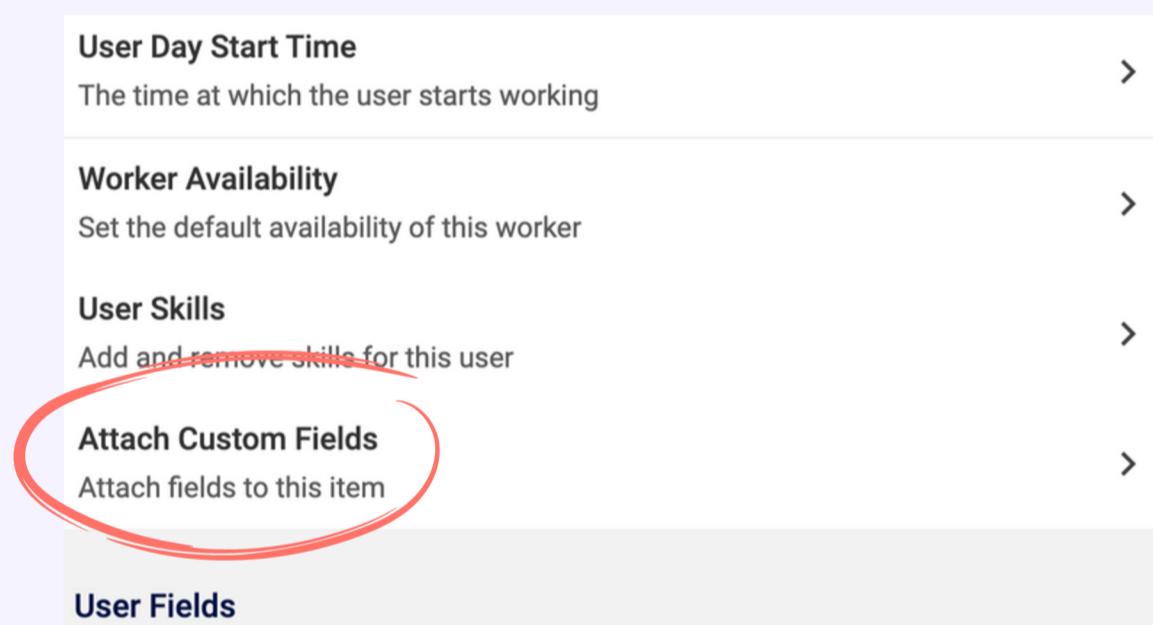
SAVE

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



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.



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.

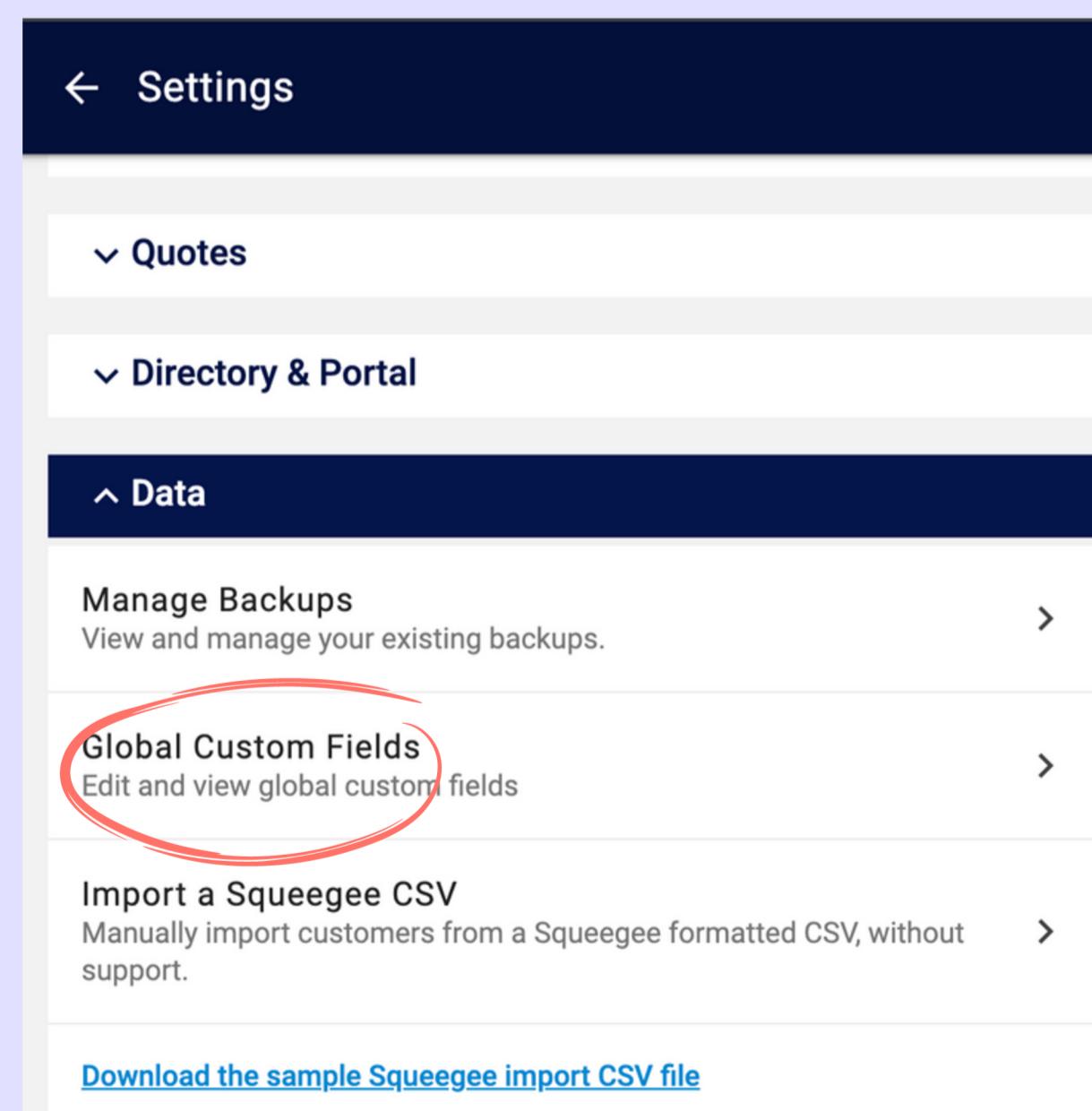
3. Enabling Custom Fields Globally

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



5. To view all forms

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

