

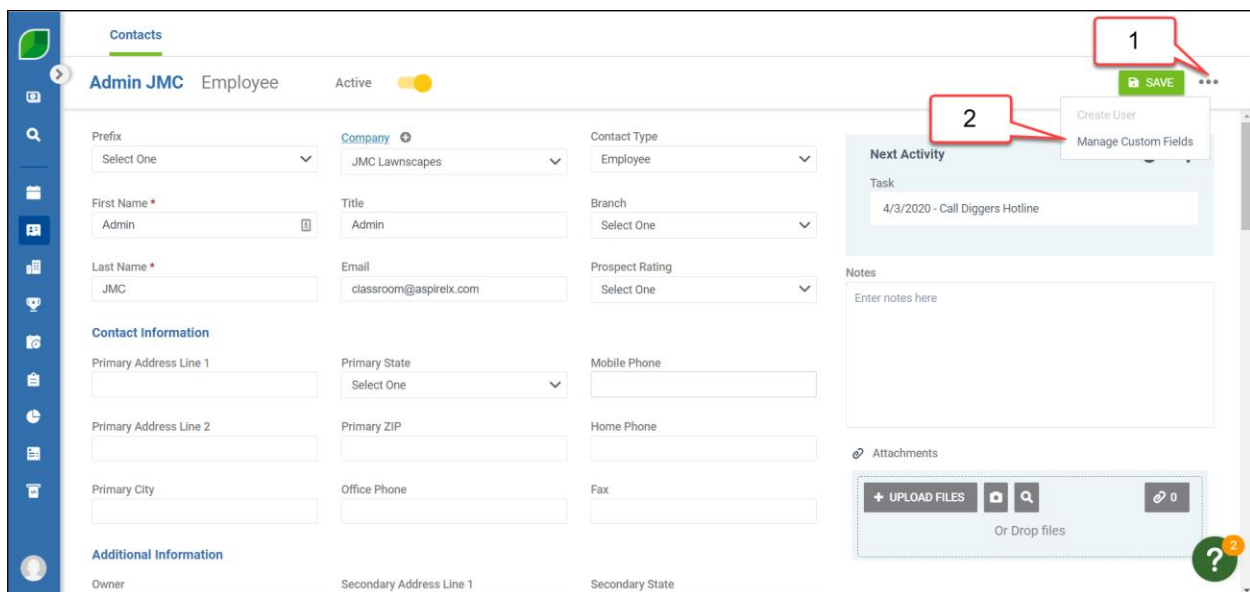
Creating Custom Fields

Purpose: Creating or modifying Custom Fields on Contact, Property and Equipment records to track specific information such as customer birthdays, house values, or if a property has pets.

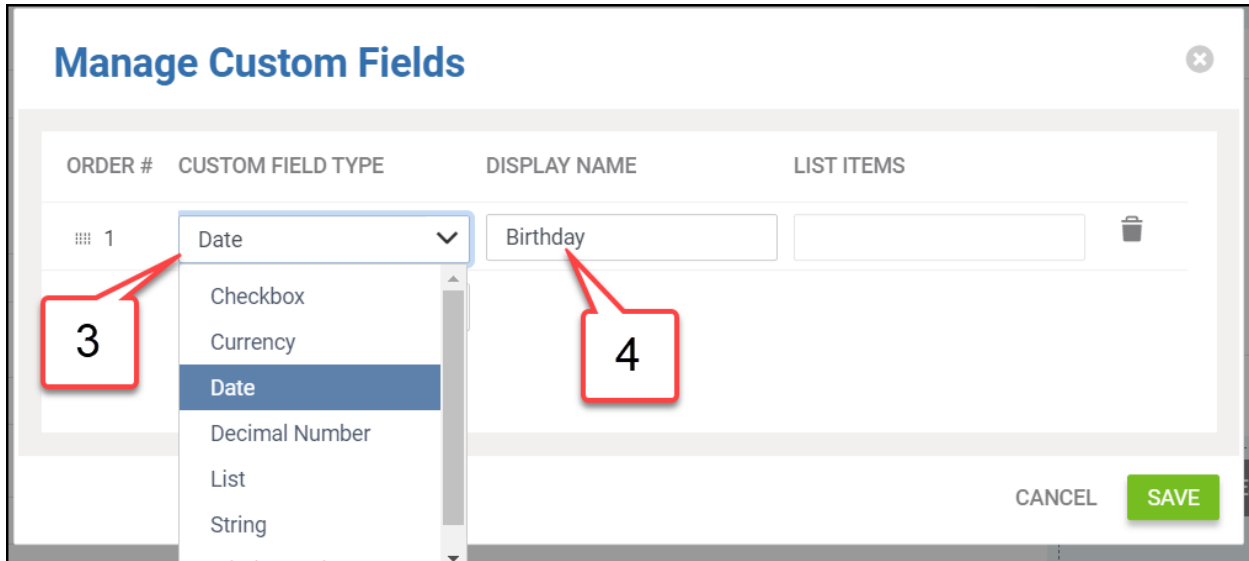
Prerequisites:

1. To view or edit the desired record (contact, property or equipment), appropriate role permission must be assigned to the user (Edit My Contacts, Edit All Contacts, Edit All properties, Edit My Properties, View Equipment)
2. System Admin permission required to add or modify custom fields

To add a Custom Field on a record, follow these steps:



1. Click on the ellipsis icon (three dots in the upper right hand corner).
2. Click *Manage Custom Fields*.



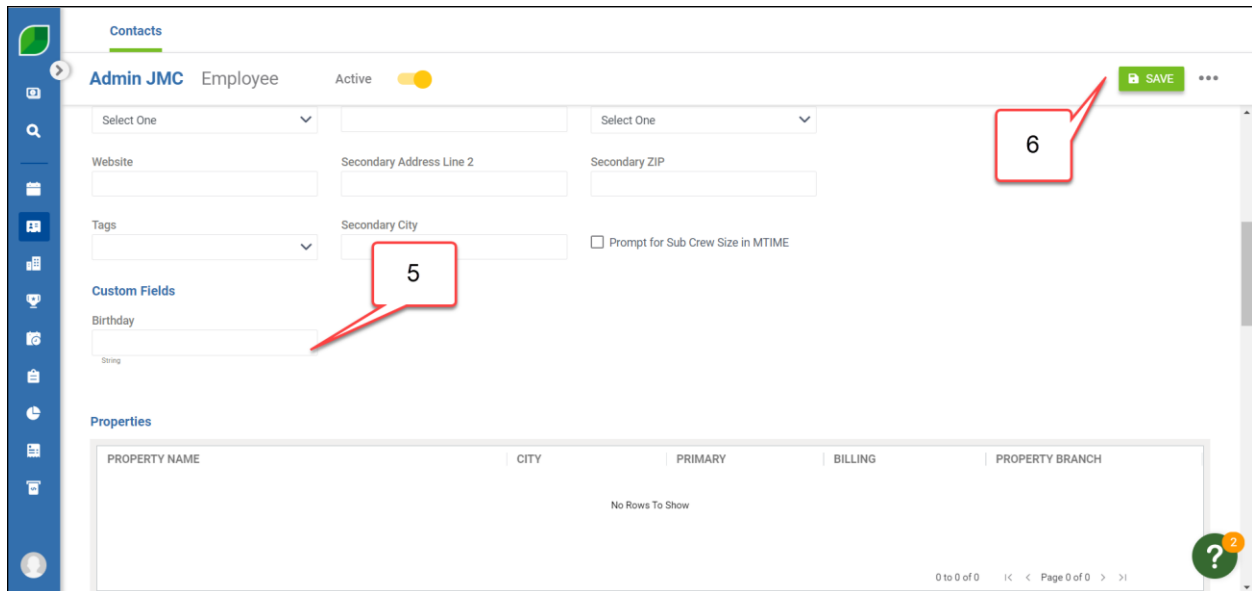
ORDER #	CUSTOM FIELD TYPE	DISPLAY NAME	LIST ITEMS
1	Date	Birthday	

3. Pick the type of field.

- a. String is a text field. Example, "James Smith."
- b. Date is a calendar. Example, "2/2/2018."
- c. Whole Number is a number without a decimal. Example, "50."
- d. Decimal Number is a number that can have a decimal. Example, "1.5."
- e. Checkbox is a box that can be checked. Example, "☐"
- f. Currency displays dollar amounts. Example, "\$52.55"
- g. Lists allow for users to select from a list of options.

Note: Go to Page 7 to see how to create a List

4. Type in the field name desired



Contacts

Admin JMC Employee Active Active

Select One Select One

Website Secondary Address Line 2 Secondary ZIP

Tags Secondary City ☐ Prompt for Sub Crew Size in MTIME

Custom Fields

Birthday

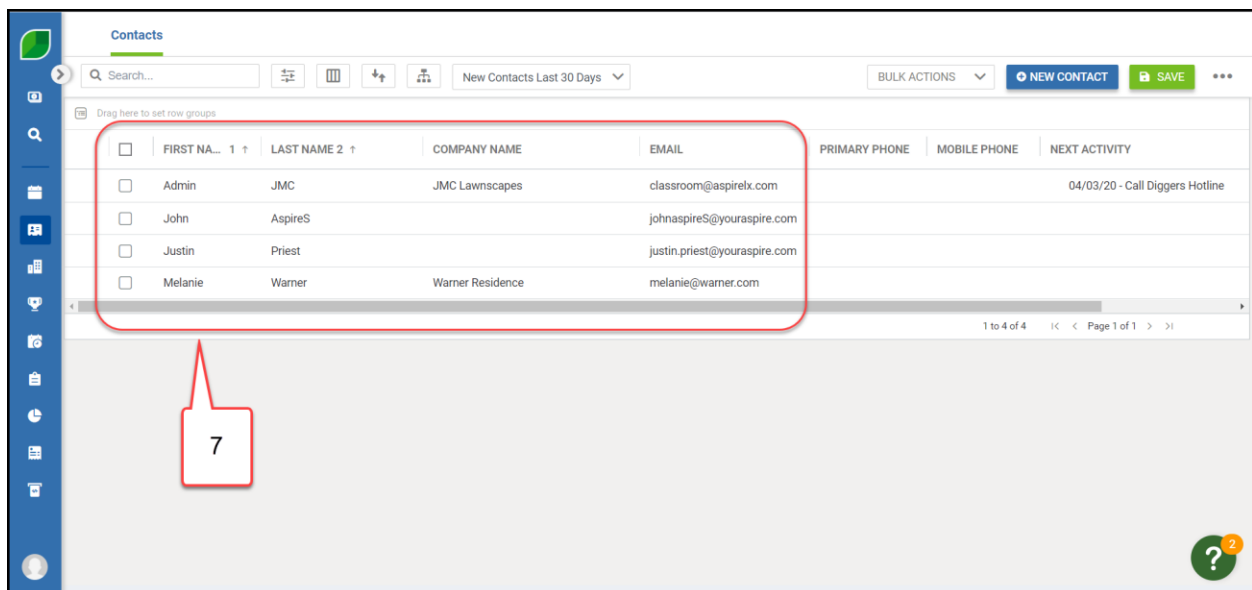
Properties

PROPERTY NAME	CITY	PRIMARY	BILLING	PROPERTY BRANCH
No Rows To Show				

0 to 0 of 0 < > Page 0 of 0 >

5. Entered the required information.

6. Click Save.



Contacts

Search... New Contacts Last 30 Days

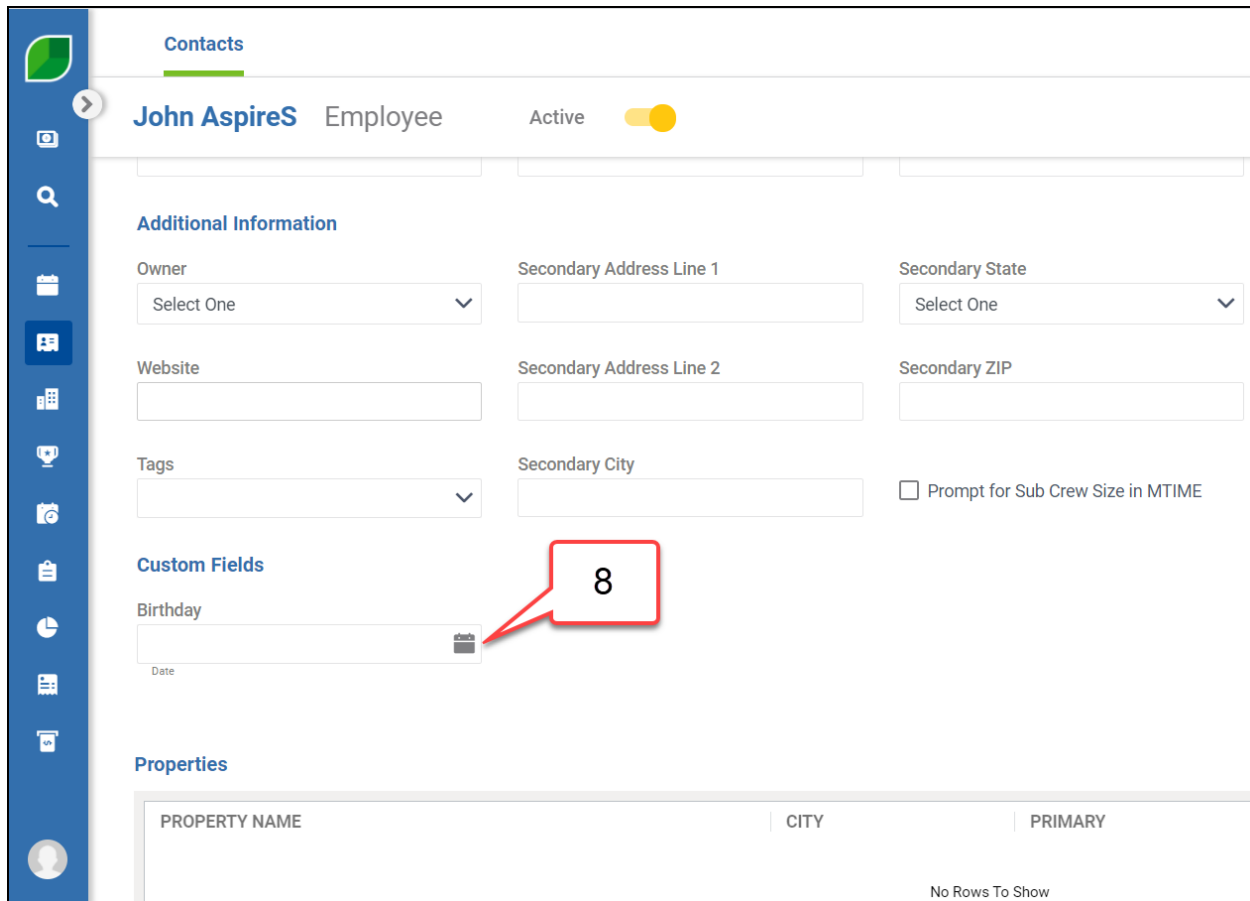
BULK ACTIONS

Drag here to set row groups

	FIRST NAME 1 ↑	LAST NAME 2 ↑	COMPANY NAME	EMAIL	PRIMARY PHONE	MOBILE PHONE	NEXT ACTIVITY
<input type="checkbox"/>	Admin	JMC	JMC Lawscapes	classroom@aspirelx.com			04/03/20 - Call Diggers Hotline
<input type="checkbox"/>	John	AspireS		johnaspireS@youraspire.com			
<input type="checkbox"/>	Justin	Priest		justin.priest@youraspire.com			
<input type="checkbox"/>	Melanie	Warner	Warner Residence	melanie@warner.com			

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7. Click on any record and enter in the information.



Contacts

John Aspires Employee Active ☒

Additional Information

Owner: Select One

Secondary Address Line 1:

Secondary State: Select One

Website:

Secondary Address Line 2:


Secondary ZIP:

Tags:

Secondary City:

☐ Prompt for Sub Crew Size in MTIME

Custom Fields

Birthday:  **8**

Date

Properties

PROPERTY NAME	CITY	PRIMARY
No Rows To Show		

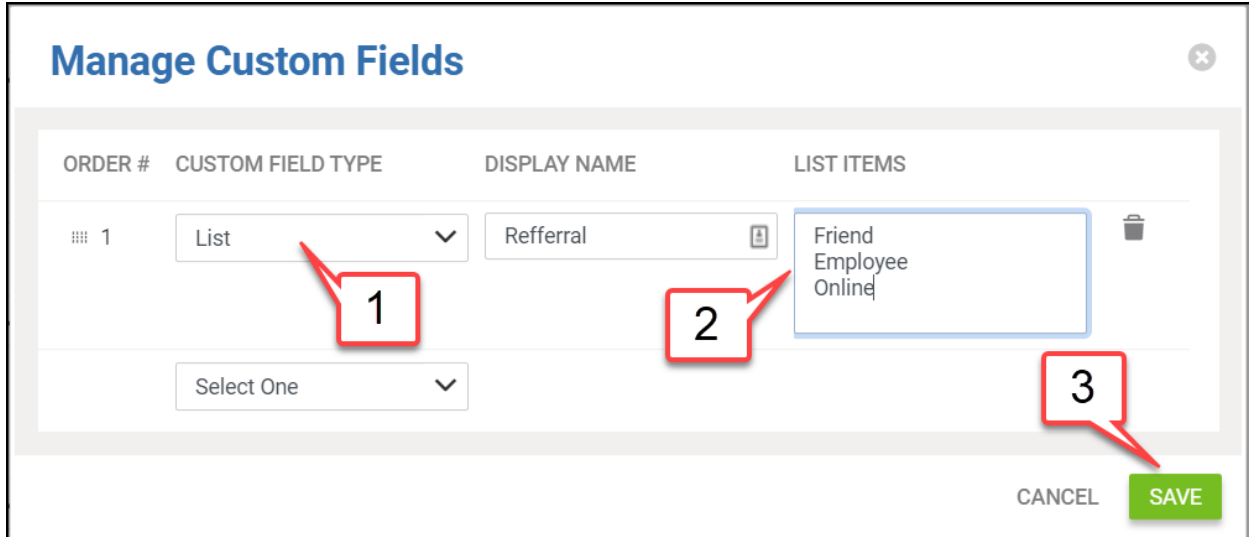
- The custom field can be used by all users.

Note: System Admin will still see the option for editing the custom field.

Creating a List for a Custom Field

Purpose: Creating Lists for Custom Field.

To add a Custom Field on a record, follow these steps:



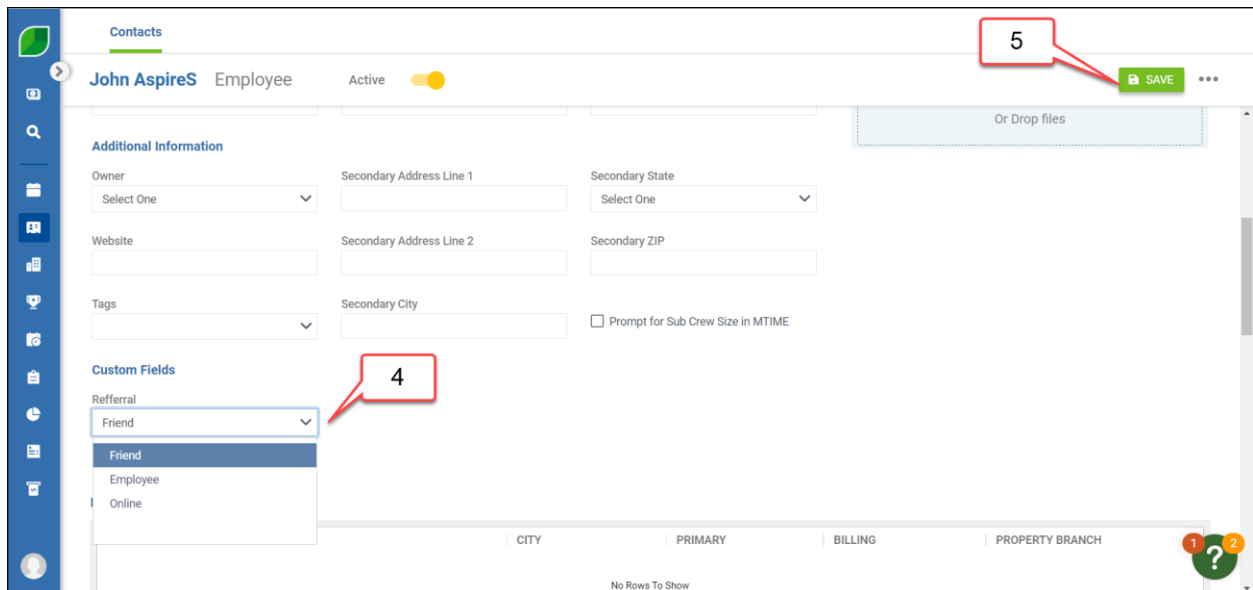
The screenshot shows the 'Manage Custom Fields' dialog box. It contains a table with columns: ORDER #, CUSTOM FIELD TYPE, DISPLAY NAME, and LIST ITEMS. The first row shows a custom field with ORDER # 1, CUSTOM FIELD TYPE 'List' (highlighted with a red box and number 1), DISPLAY NAME 'Refferral' (highlighted with a red box and number 2), and LIST ITEMS containing 'Friend', 'Employee', and 'Online' (highlighted with a red box and number 3). Below the table is a 'Select One' dropdown menu. At the bottom right are 'CANCEL' and 'SAVE' buttons.

ORDER #	CUSTOM FIELD TYPE	DISPLAY NAME	LIST ITEMS
1	List	Refferral	Friend Employee Online

Select One

CANCEL SAVE

1. Select List from the dropdown menu and select the List items.
2. Type in the entries for the List. Create a new line for every entry that should be in the dropdown list. Do not write all the entries on one line.
3. Select Save.



Contacts

John Aspires Employee Active Active

Or Drop files

Additional Information

Owner Select One

Secondary Address Line 1

Secondary State Select One

Website

Secondary Address Line 2

Secondary ZIP

Tags

Secondary City

☐ Prompt for Sub Crew Size in MTIME

Custom Fields

Refferal Friend

Friend

Employee

Online

CITY PRIMARY BILLING PROPERTY BRANCH

No Rows To Show

4. Check the dropdown for the Entries.
5. Select Save.