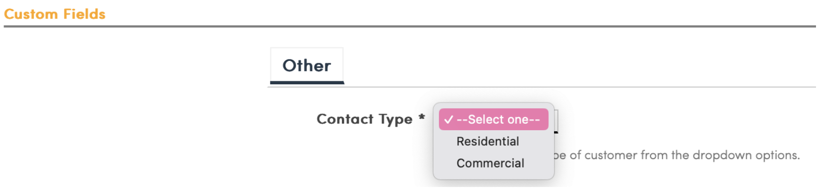
Custom Fields

08/16/2024 11:58 am CDT

Overview

Custom Fields allow an organization or brand to include more unique information fields or identifiers needed for operations. For instance, a popular Custom Field for Contacts, is including if they are Residential or Commercial customers.



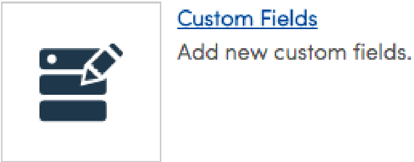
You can make Custom Fields "required" so that it has to be filled out before saving and moving on.

You can define custom fields for Contacts, Proposals (as well as Proposal Line fields) and Appointments. The primary difference between these is that:

- Custom Contact Fields can have a single value for each contact
- Custom Appointment Fields and Proposal Custom Fields can have a unique value for each appointment or proposal.

Settings and Navigation

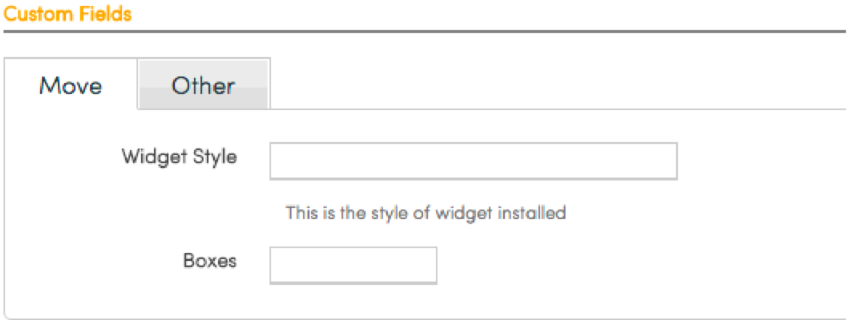
To set up custom fields, go to **Control Panel > Custom Fields**. This is located in the **Contact Settings** section.



Custom Field Categories

You can group Custom Fields into Categories (Contacts, Proposals, Proposal Lines, Appointments.) Categories are used to organize groups of Custom Fields during data entry (so Add and Edit pages). When adding or editing, the custom fields will be grouped toward the end of the fields and if there are any that have categories, the custom fields will be segmented into tabs.

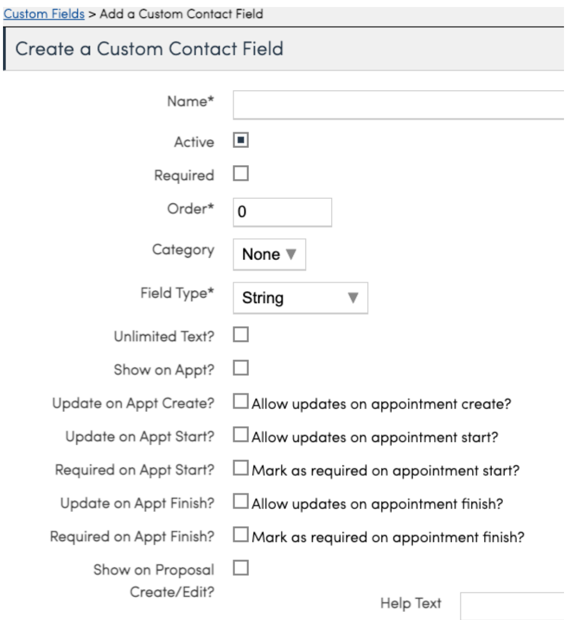
Below is an example of 2 custom fields in the **Move** category.



Custom Contact Fields

You can add as many custom fields as you want. Keep in mind though that the number of custom fields you have may impact the performance of viewing contacts and/or appointments.

Each custom field must have a unique name.



Details

- **Name -** The name for the custom field
- **Active -** If you don't want to display or capture data for this field any more, clear the Active checkbox. The data will not be deleted, just hidden.
- **Field Types:**
  - **String -** any kind of text
  - **Integer -** integer values (no decimal points)

    - **Decimal -** floating point values (with decimal points)
    - **Date -** a date field
    - **Checkbox -** a checkbox (yes/no) value
    - **Phone -** a field formatted for capturing/displaying phone numbers
    - **Grid -** a field formatted for capturing grid type data
    - **Email -** a field formatted for capturing email addresses
    - **User -** lets you select an existing active serviceminder.io user
    - **Dropdown -** a pick list - you can define the different values to chose from in the list
- **Unlimited Text -** string fields normally are limited to 64 characters. Checking this option lets you enter an unlimited number of characters
- **Category -** sets the category for the custom field (set to None if you don't want the field in a category)
- **Help Text -** you can specify help prompt text for the custom field (displayed when adding or editing)
- **Display Row/Column/Span -** custom contact fields are displayed in a virtual grid below the main detail data. All of the fields are sorted by the Display Row first, then the Column, and then by Name. Use the Span setting to have a value display across multiple columns.

Custom Appointment Fields

Custom Appointment Fields are identical to Custom Contact Fields, with two additional options available:

- **Copy From Previous** - This option will copy the value from the previous appointment at the same contact. You can use this a variety of different ways, including using it to track a meter or level. When finishing the appointment, the value will pre-fill with the previous meter reading and you can then update it to the new reading.
- **Phase** - This controls when the value is prompted for. Possible values are:
    - **Any -** value is always prompted for (both during scheduling and during finishing)
    - **Schedule -** value is prompted only when scheduling an appointment (or editing an existing appointment)
    - **Finish -** value is prompted only when an appointment is finished

These two options help control both initial values on new appointments as well as when the values are prompted for. Values captured during scheduling might be used for specific things needed prior to doing the appointment.

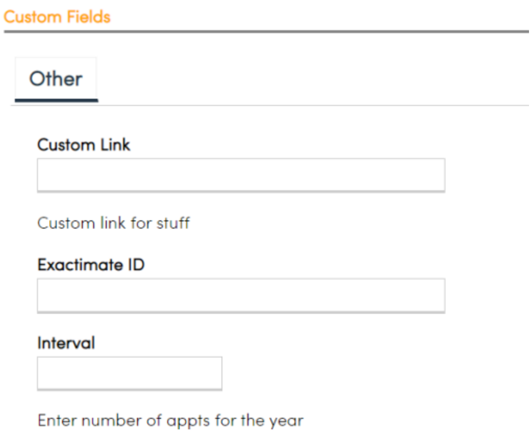
Values captured during the Finish phase might be needed to track data for when appointments are completed, such as things like weather conditions, chemical consumption, initials to indicate the work area was cleaned up, etc.

Another cool thing about Custom Appointment Fields is that they can be tied to a specific Service or Part. Think of it this way - if you have a large number of custom appointment fields, but many are specific only when an appointment is for a certain service, or when an appointment has a certain Part, your agents in the field won't have to wade through dozens, if not hundreds, of custom fields, not knowing what's relevant. When you tie a Service or Part of an appointment field, it will ONLY show on the appointment if that Service and/or Part is tied to it. *You must create the Custom Appointment Field first, save it, then edit it to see the list of Services, and a search bar for Parts.*

Custom Proposal Fields

Custom Proposal Fields are used on proposals when creating/editing the proposal.

They have the same field type options as the other custom fields, and are generally used for something that applies to the proposal as a whole (as opposed to individual parts in the proposal) - lot size, special instructions, etc. These can change based on the proposal as opposed to something that may need to be set on the contact that will apply overall.

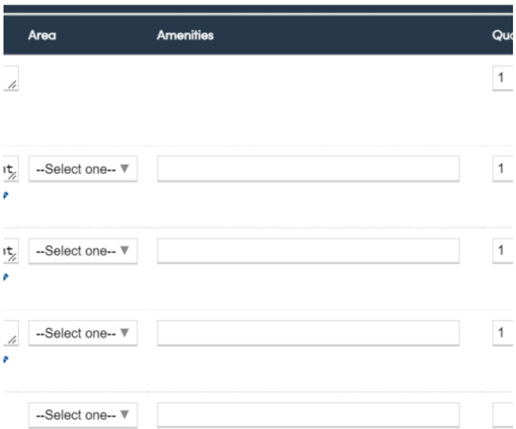


The fields' values will display at the bottom of the internal proposal view.

Custom Proposal Line Fields

Custom Proposal Line Fields are used on proposals for each line item.

They also have the same field type options as the other custom fields and are great for situations where parts need specific info attached just to that - quantity, color, room type, etc.



These are configured on each line individually and display in the proposal table.

Using custom fields on proposal lines does make the space wider and can create the need to side-scroll in order to see everything on the internal proposal view.

Phone Labels

Phone labels are used to provide context for Phone Numbers. You can create as many labels as you want though you may want to set up just a few common ones, such as Home, Work, Mobile or His Mobile, Her Mobile, etc.