

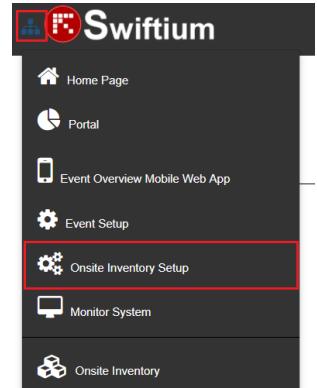
Summary: Create custom fields that can be used to record information about customers. Fields are defined on a per Event basis. Optionally, a set of default custom fields can be defined. This set of fields will automatically be added to newly created Events. This will save time for the fields that are applied to all Events. There is no limit on the number of custom fields an Event can have.

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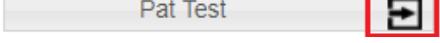
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Account Default Custom Fields:

1. Login to the Swiftium Reporting Portal. →
2. Navigate to the *Onsite Inventory Setup* Portal using the site map left of the header logo.
3. Select the *Account Defaults* tab from the tab list. → **Account Defaults**
4. Scroll down to the *Default Customer Fields* panel.
5. Continue to the [Custom Field Editor Interface](#) found below.



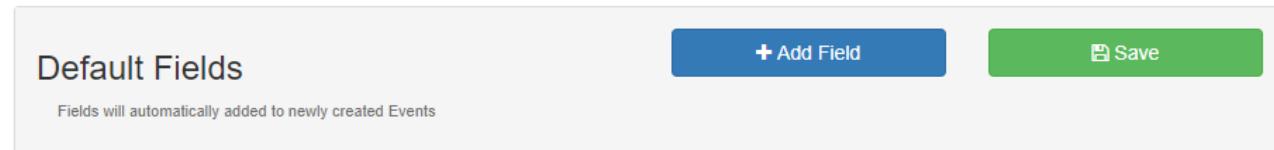
Event Custom Fields:

1. Navigate to the *Onsite Inventory Setup* Portal following the instructions in the [Account Default Custom Fields](#) section above, stopping after step 2.
2. Select an Event from the list of events. → **Pat Test** 
3. Locate the *Custom Customer Fields* panel.
4. Continue to the [Custom Field Editor Interface](#) found below.

Custom Field Editor Interface:

The interface for managing custom fields is the same for both the Account Default Fields and the Event Fields. This section will cover how to use the interface to manage all aspects of the custom fields.

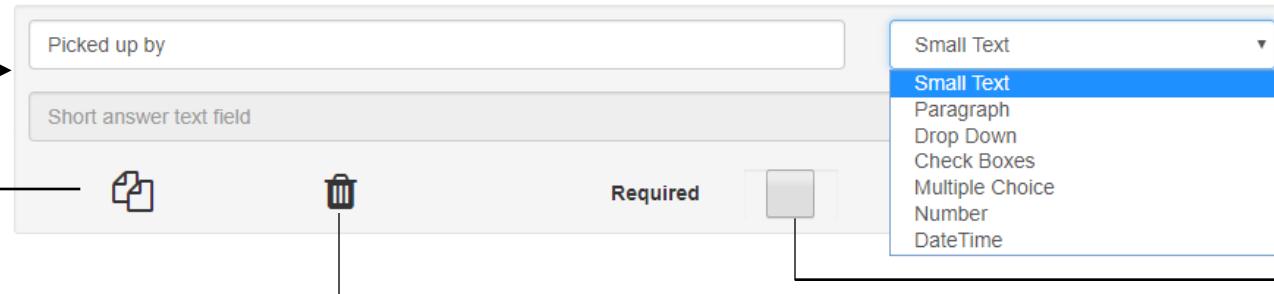
The main controls for the interface are located in the panel header. The *Add Field* button adds a new field to the set. The *Save* button commits all changes to the server.



Fields are identified using a name. The name can be any arbitrary name up to 150 characters long. This name is required by the system.

There are many different types of fields that can be used to meet the requirements for the Event. The field type can be changed using the dropdown box to the right of the field name textbox.

- **Small Text:** A single line textbox.
- **Paragraph:** A multi-line textbox.
- **Dropdown:** A dropdown box with predefined options.
- **Checkboxes:** One or many checkboxes with predefined options.
- **Multiple Choice:** A question that has predefined options but only one can be chosen.
- **Number:** Only a number may be entered.
- **Date Time:** A date time selection box for timestamping purposes.



Click the trashcan icon to delete a field.

Click the copy icon to make a copy of the field.

Optionally, a field can have a description to help the user develop a more accurate response. This description will appear beneath the field in the entry form. This option can be enabled by checking the *Show Description* checkbox at the bottom of the field.

Optionally, making the field *Required* will force the user modifying the customer record to input a response. This option can be enabled by checking the *Required* check box at the bottom of the field.

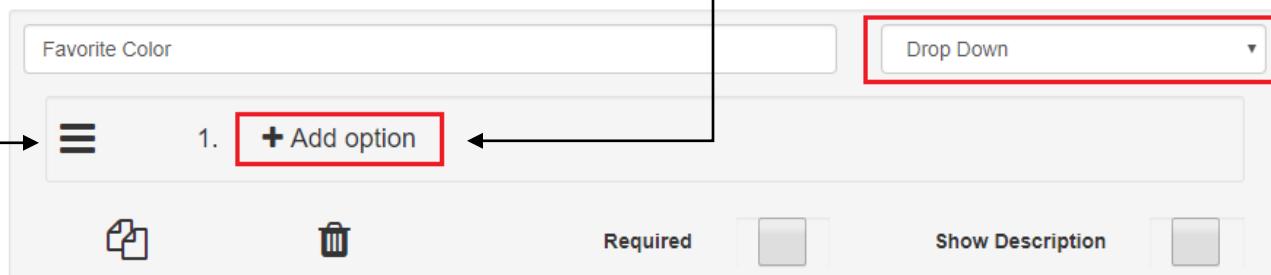
Option Fields:

Option fields allow the user to select an option from a predefined list. Field types that include predefined options are Dropdown, Checkboxes, and Multiple Choice. These field types have a slightly different interface than their counterparts.

Option icon identifiers are used to indicate what type of input control will be used in the entry form. See table below for identifier icon definitions.

 Dropdown	 Checkbox	 Multiple Choice
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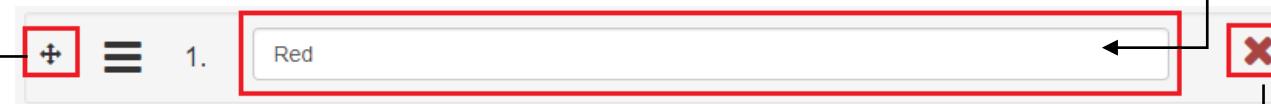
To add options to a field, click the *Add Option* button. →



The screenshot shows a 'Favorite Color' dropdown field. The 'Field Type' dropdown is set to 'Drop Down'. Below it, there's an 'Add option' button with a plus sign and a number '1.' To its right is a red-bordered box. At the bottom of the screen are icons for file, trash, required status, show description, and a red X button.

This will add a new option above the *Add Option* button.

Fill in the option with the desired response. →



The screenshot shows the same dropdown field after adding an option. The 'Red' option is now listed above the 'Add option' button. A red-bordered box surrounds the 'Red' text. A red X button is located to the right of the option.

→ To re-order a field's options, click and hold an option's drag handle. Then drag the field to the desired location.

To remove a field's option, click the red X button on the right side of the option. ←

Onsite Inventory Usage:

Event fields will display in both Creating and Editing customer entry forms.

Field descriptions will appear beneath the fields. This example has a dropdown field with a short description of the intended use of the field.

Favorite Color

what is the client's favorite color? This is used in their gift basket. →

Date Time field types will display a date/time picker for the field input control.

