

# DASH

**USER GUIDE**

# **Create Custom Tabs, Fields, and Tables**

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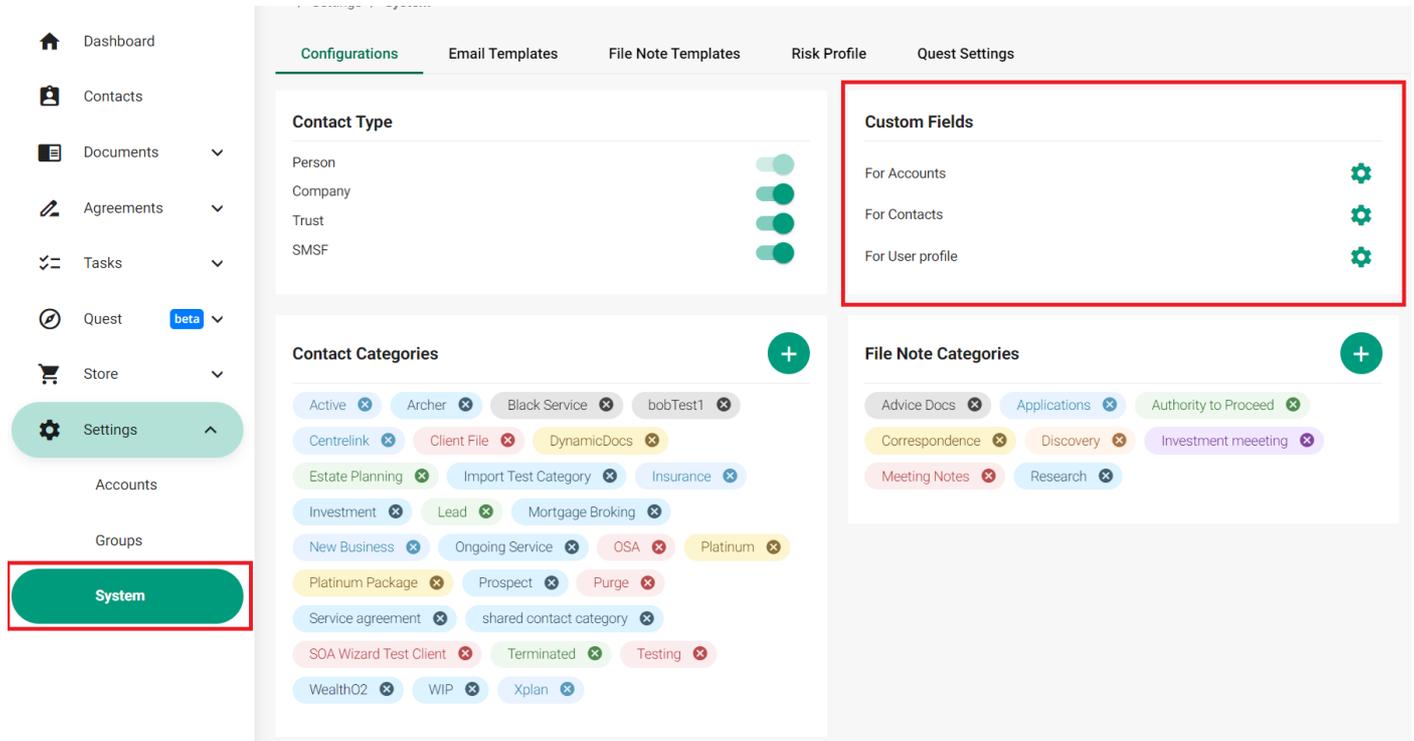
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# Introduction

This user guide will show you how to create Custom Tabs, Fields, and Tables for your Accounts, Contacts, and User Profile in Page.

To create custom fields, go to Settings -> System -> Custom Fields

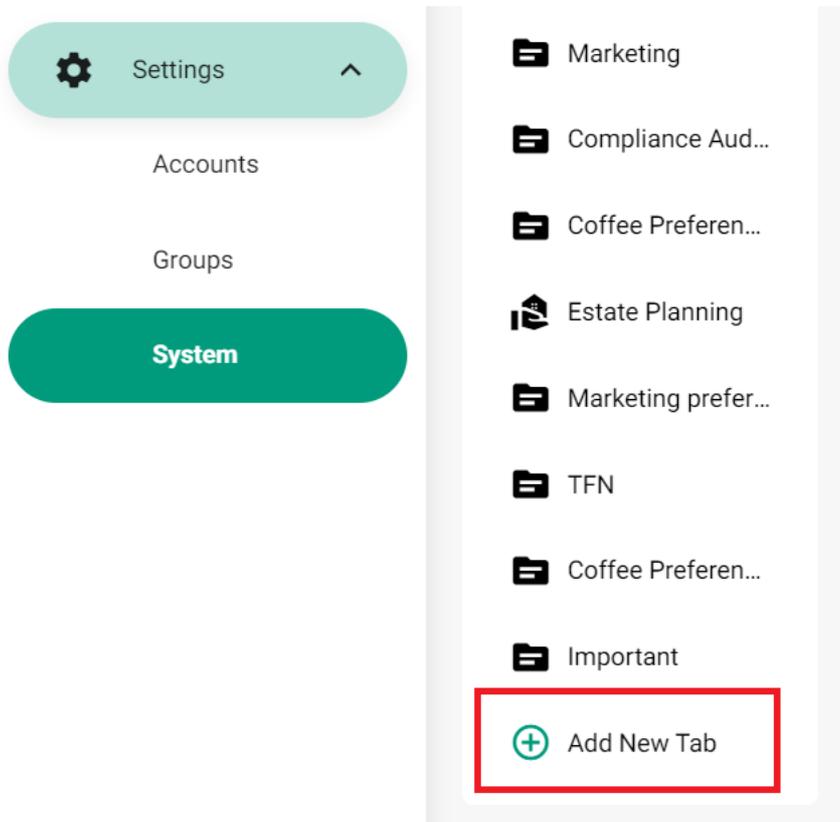


There are three areas where custom fields can be created,

1. For Accounts -> Create Custom fields in Settings -> Accounts Page
2. For Contacts -> Create Custom fields in Contacts -> Information Page
3. For User Profile -> Create Custom fields in Settings -> Accounts -> User Profile Page

## Create a new Custom Tab

To create a custom tab, you will have to click “Add New Tab” inside the Custom Fields Settings Page.



In the pop-up to create new Tab, you will have to give a **Name** and **Tab Key**.

**Visibility** is to define which contact type you want this tab to show. In the example below, this **Insurance Review Date** tab will only show in **Person** Contact.

### Add New Tab

Name \*

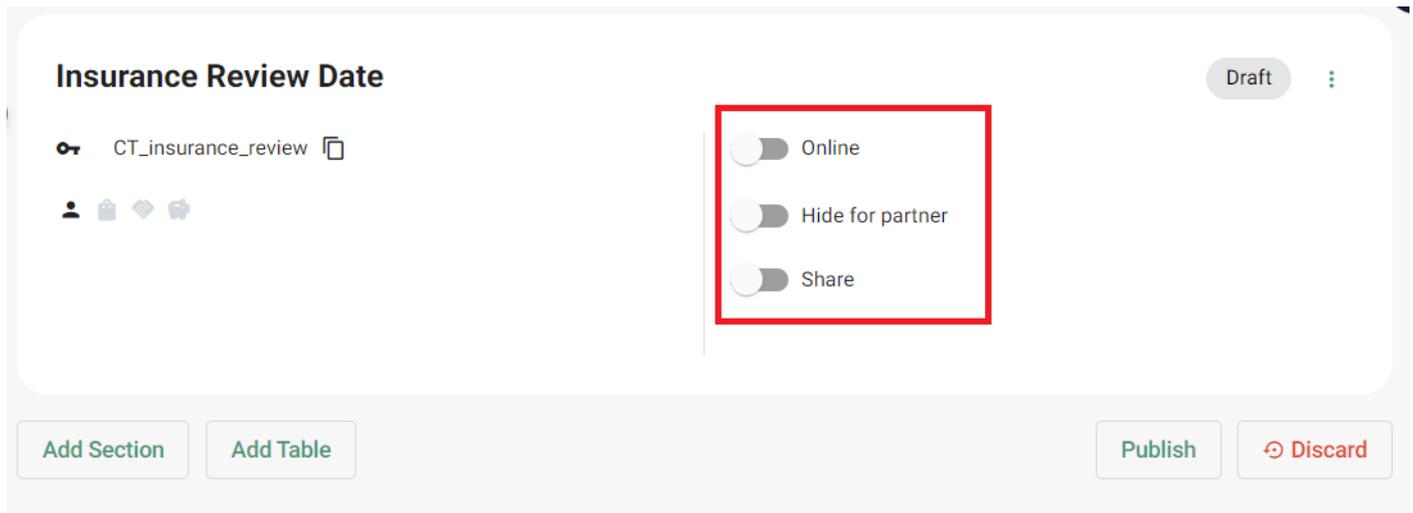
Tab key \*

Visibility

Person  Company  Trust  SMSF

Cancel

Once a new section is created, you will have three toggles at the right hand side.



1. Online -> To make the Tab live in the Contacts' Information Section
2. Hide for partner -> This will only show one field for both Client and Partner. For example, Advice Details Section.
3. Share -> If you have child groups under your group, you can share it down to all your child groups. This functionality is mainly for Head Office groups where they create custom fields for all of their practice groups.

There are four more buttons below are for

1. Add Section -> To Add Custom Fields
2. Add Table -> To Add Custom Tables
3. Publish -> To Publish the newly added custom fields / tables
4. Discard -> To Revert back prior to edit

# Create Custom Fields

To create custom fields, you will have to click “Add Section” first.

In the Add Section, you can set up a couple of options

1. Display -> Display Full Width or Half Width in the CRM
2. Filter by Entity -> Show the fields for all entities or just the entities selected? By default, it will be all entities.

## Add New Section



Section name \*  
Insurance Review Date

Section description

**Display**

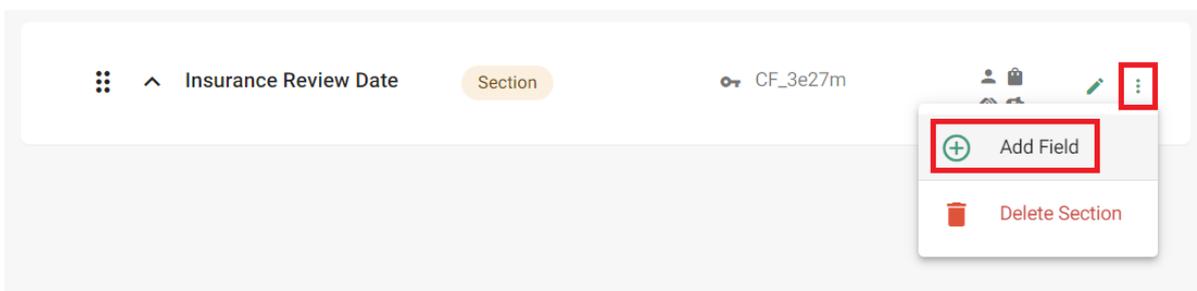
Full width  Half width

Filter by Entity - Optional

Person  Company  Trust  SMSF

Cancel **Add**

After adding the section, you will have to click on “three dots” and “Add Field” to create a new field under the section.



You will have to enter the **Label name** and the **field type** before you can create a new field.

## Add Field



Label name \*  
Review Date

Key name \*  
CF\_vjxb9

Description

Filter by Entity - Optional

Person  Company  Trust  SMSF

Required

Searchable

Type  
Date

Cancel

The additional settings you can set are

1. Filter by Entity
2. Field is required or not required
3. Searchable -> To be able to search in Widgets in the Dashboard

Once you have added all the fields, you will have to **publish** the changes and turn on the **Online** toggle.

**Insurance Review Date** Published

CT\_insurance\_review

Online [Please take this tab offline to edit tab details](#)

Hide for partner

Share

[Edit](#)

Insurance Review Date Section CF\_3e27m

# Create Custom Tables

To create custom fields, you will have to click “Add Table” first.

## Add New Table



Table name \*

Review Dates Table

Table key \*

CA\_review\_date

Table description

### Display

Full width

Half width

Filter by Entity - Optional

Person

Company

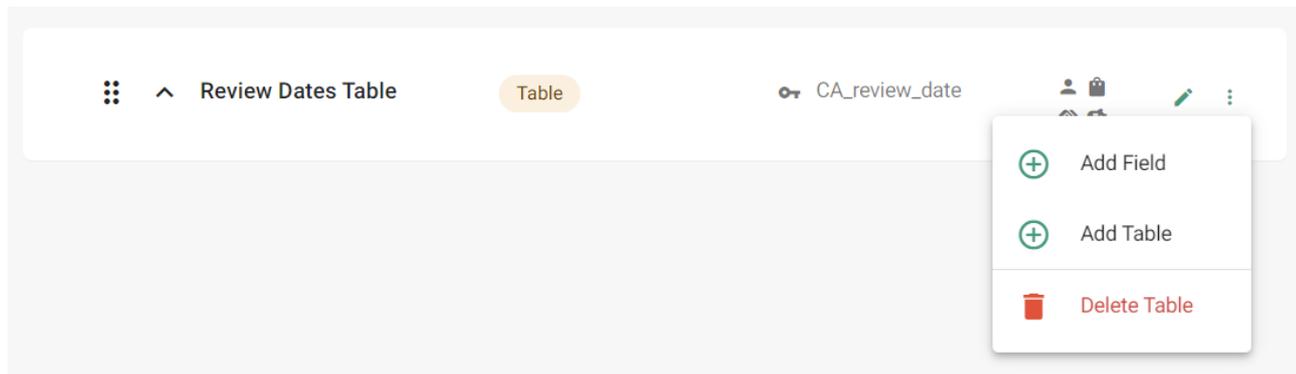
Trust

SMSF

Cancel

Add

Once the table is added, you can add fields or tables under the table.



When creating the field in table, you will have to turn on the “Summary” for the fields to show in the table.

## Edit Field



Label name \*  
Review Date

Key name \*  
CF\_ffu0q

Description

Filter by Entity - Optional

Required

Summary

Searchable

Type  
Date

In this example, I've created a field (Review Date) and a table (Additional Dates) with Review Comment field inside.

Review Dates Table	Table	CA_review_date		
Review Date	date	CF_ffu0q		
Additional Dates	Table	CA_4hcke		
Review Comment	text	CF_cq13j		

In the CRM, the first “Review Date”, will show in the Information tab.

**Review Dates Table (Alice Wheel)**

+ Add Review Dates Table

Review Date

^ 25/01/2024

Information Additional Dates

Review Date  
25/01/2024

Edit

The sub table “Additional Dates”, will show in the another tab.

**Review Dates Table (Alice Wheel)**

+ Add Review Dates Table

Review Date

^ 25/01/2024

Information Additional Dates

Review Comment

^ Comment

Information

Review Comment  
Comment

Edit

Add Additional Dates