USER GUIDE

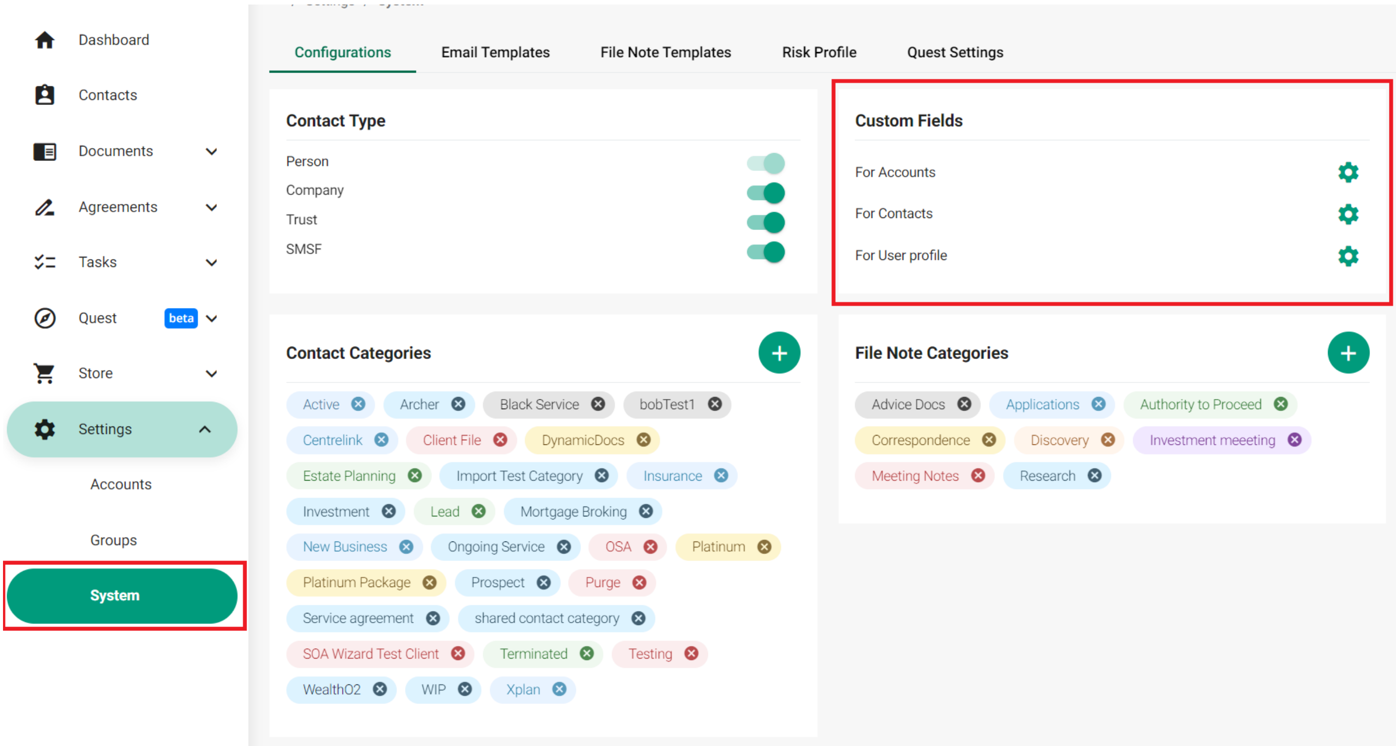
Create Custom Tabs, Fields, and Tables

Contents

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

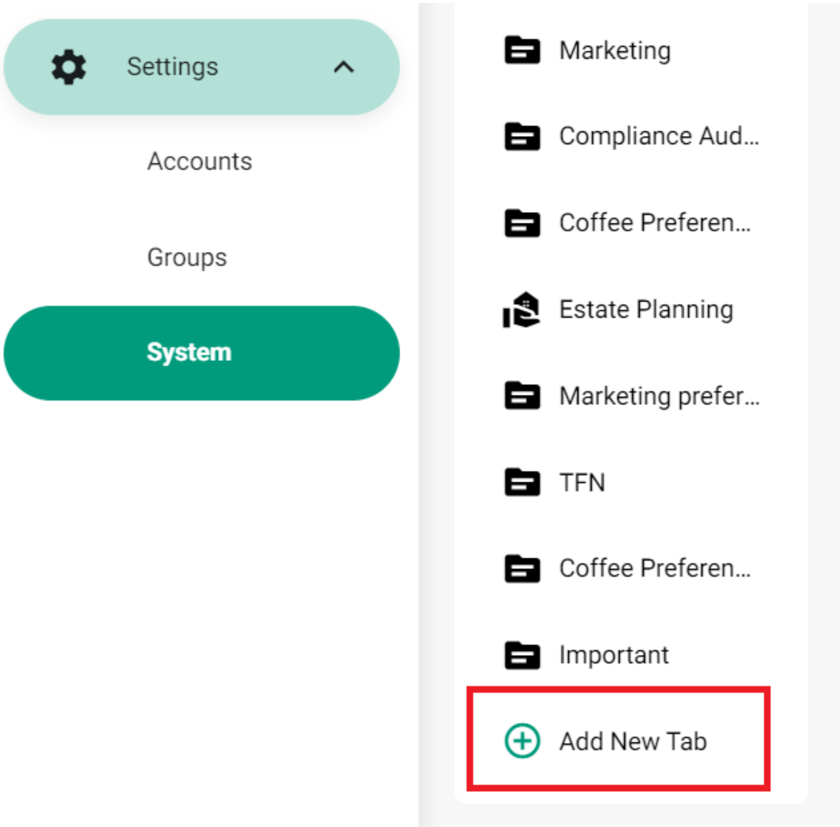


There are three areas where custom fields can be created,

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

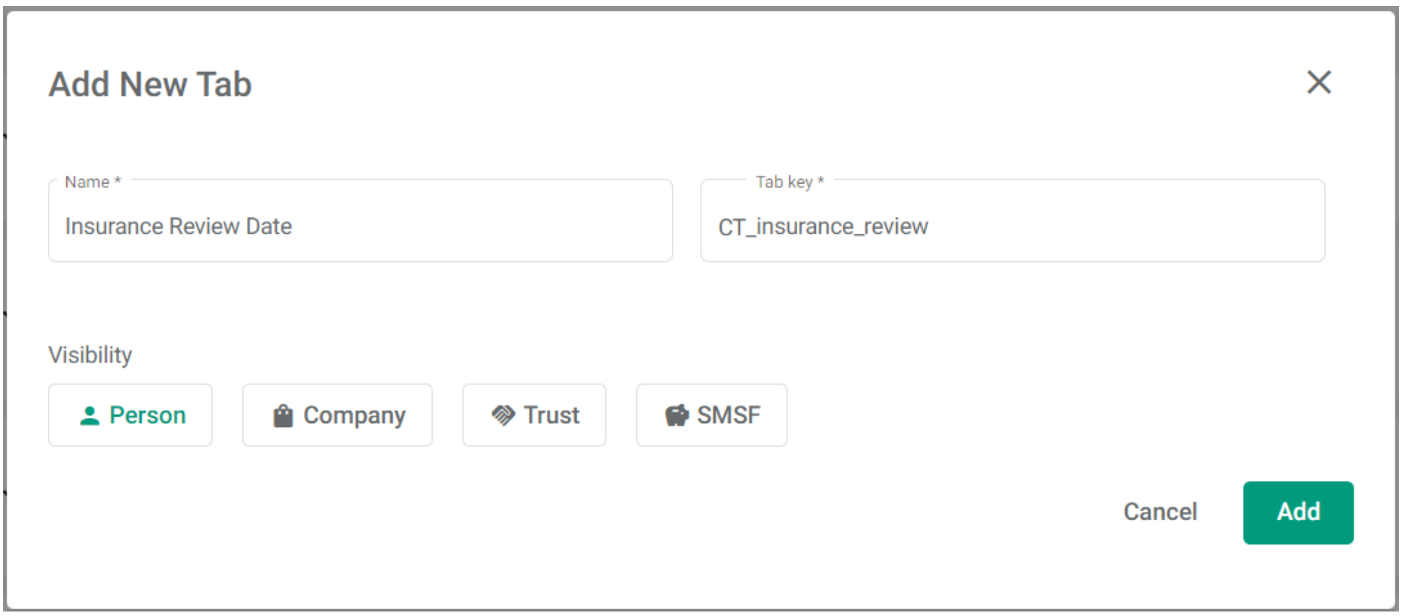
Create a new Custom Tab

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

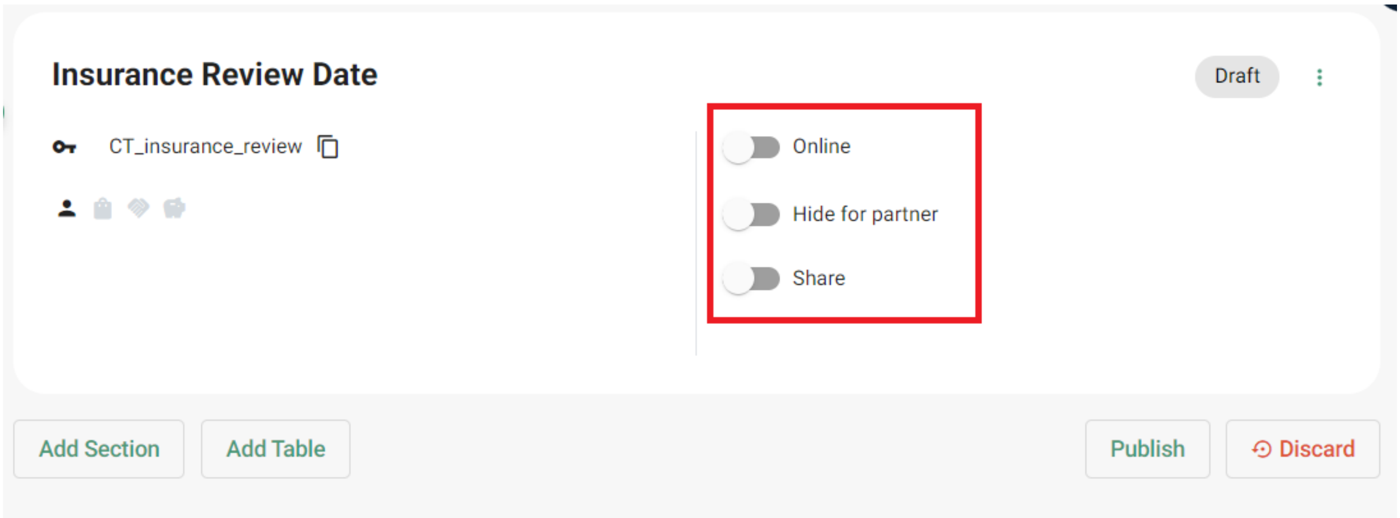


In the pop-up to create new Tab, you will have to give a **Name** and **Tab Key**.

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.



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

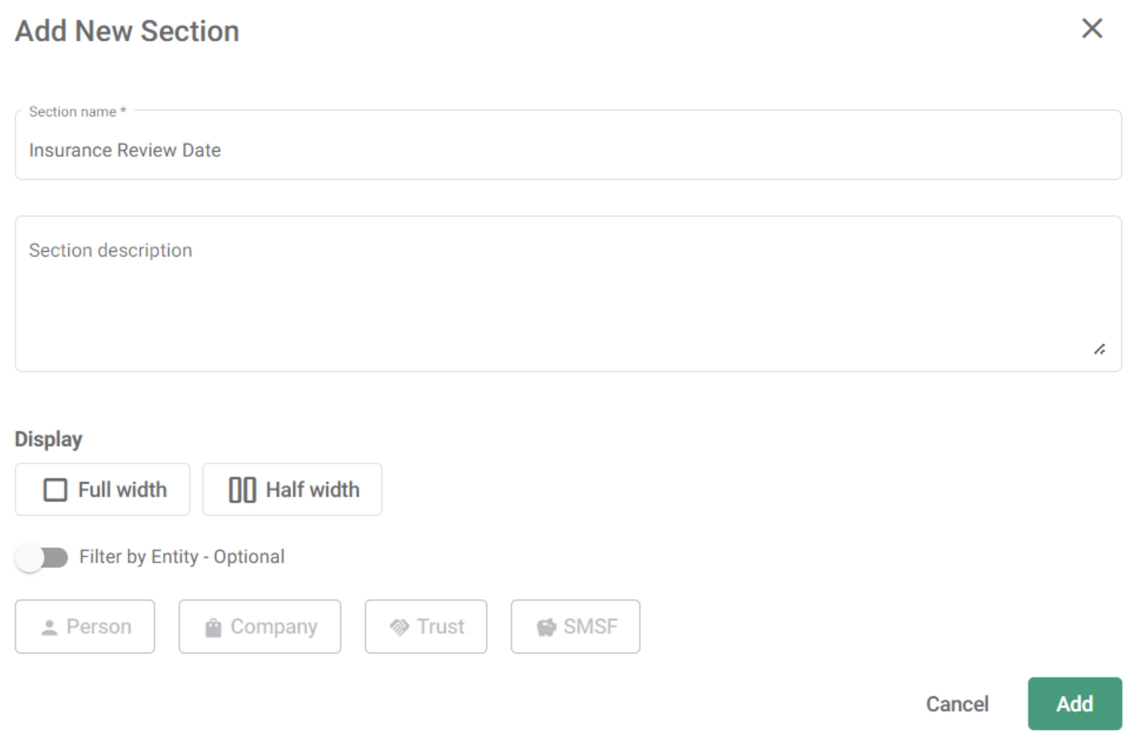
1. Add Section -> To Add Custom Fields
2. Add Table -> To Add Custom Tables
3. Publish -> To Publish the newly added custom fields / tables
4. Discard -> To Revert back prior to edit

Create Custom Fields

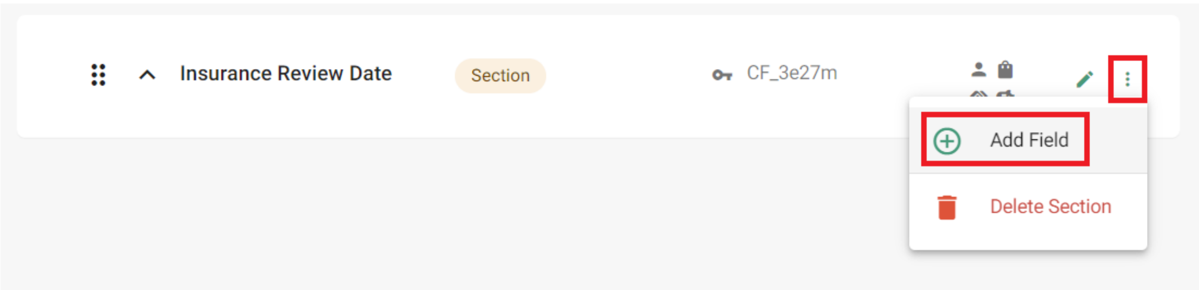
To create custom fields, you will have to click “Add Section” first.

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

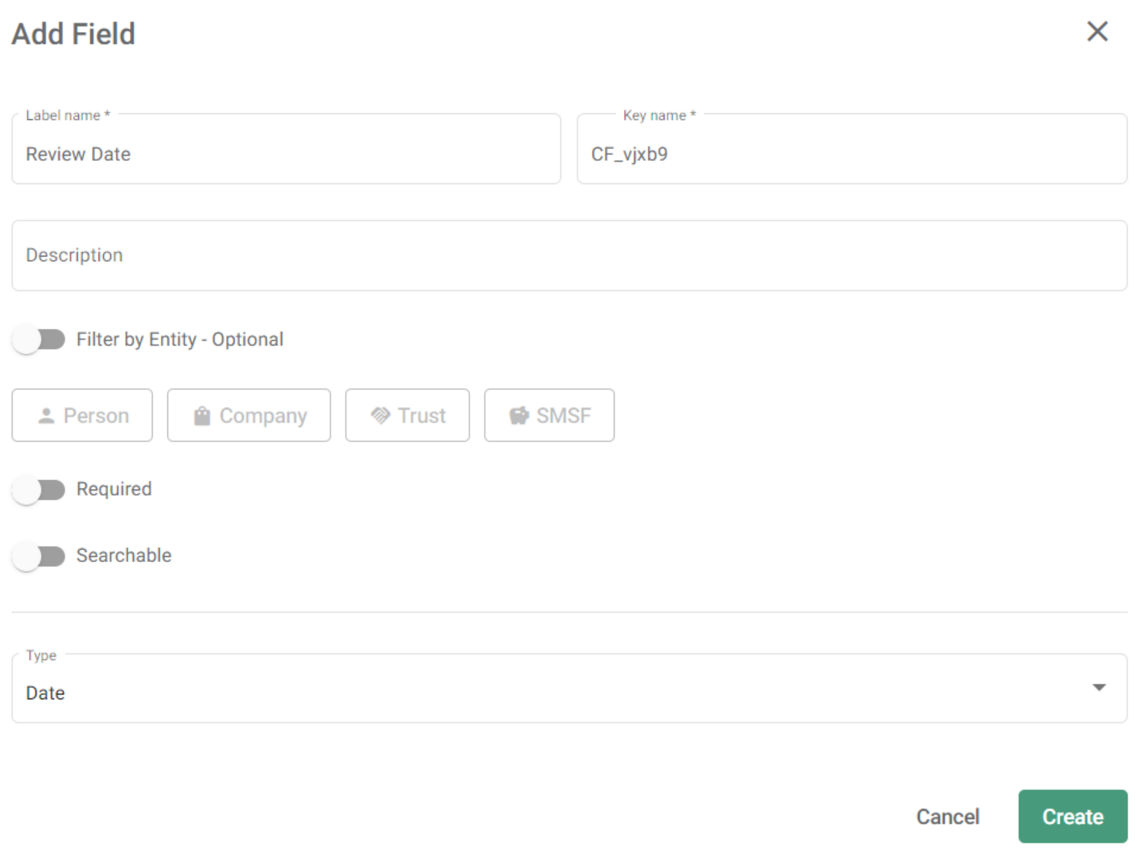
1. Display -> Display Full Width or Half Width in the CRM
2. Filter by Entity -> Show the fields for all entities or just the entities selected? By default, it will be all entities.



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



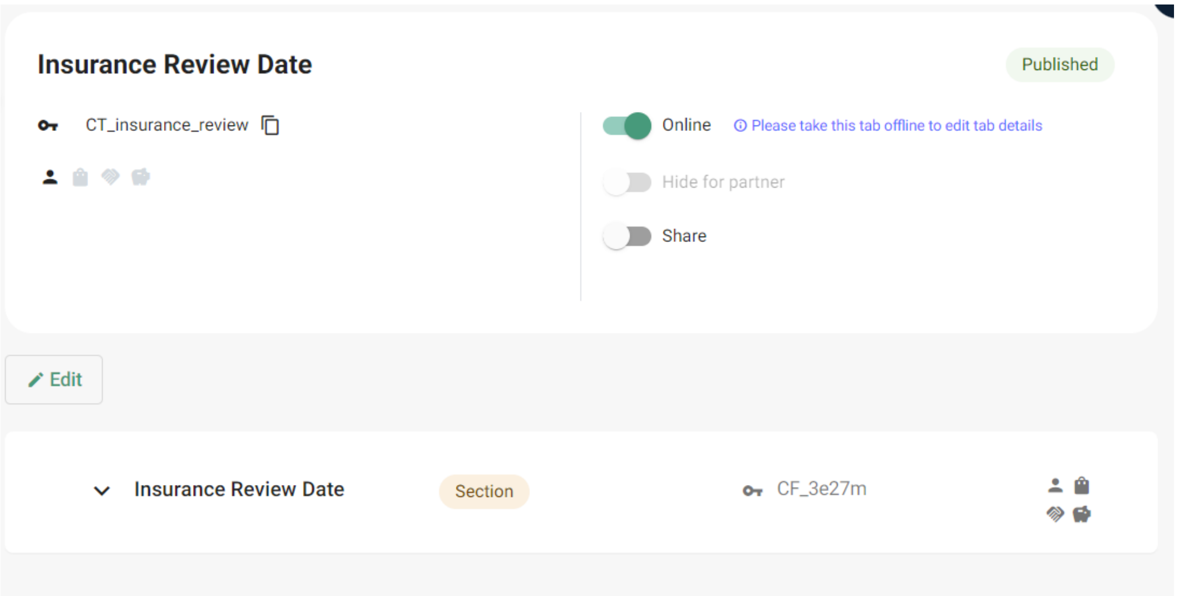
You will have to enter the **Label name** and the **field type** before you can create a new field.



The additional settings you can set are

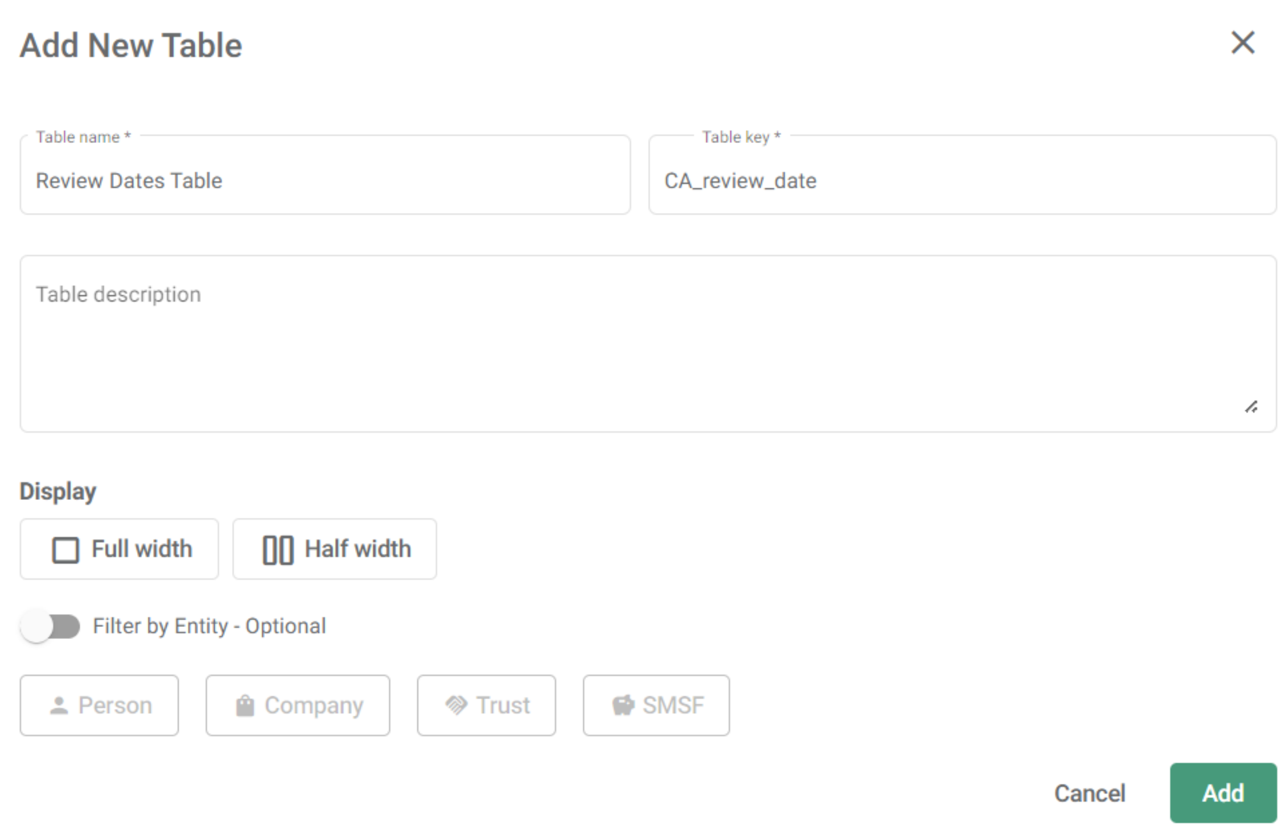
1. Filter by Entity
2. Field is required or not required
3. Searchable -> To be able to search in Widgets in the Dashboard

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

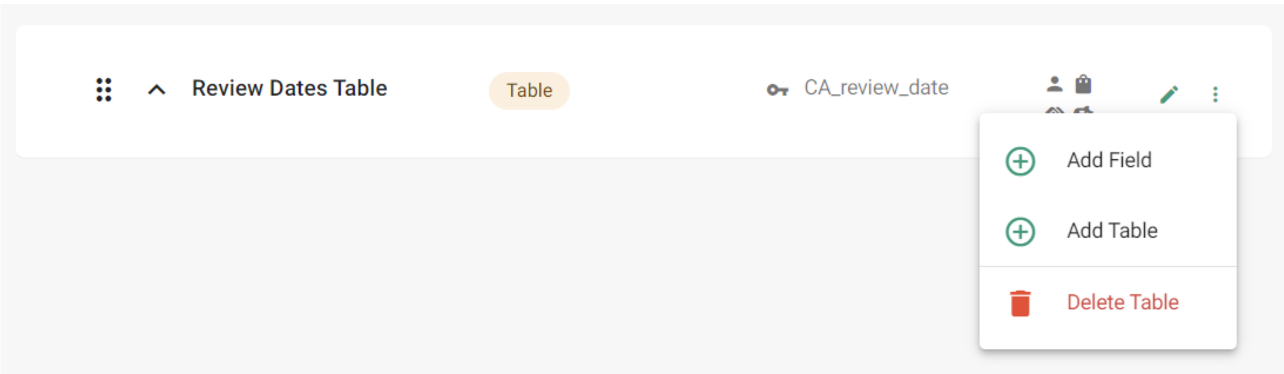


Create Custom Tables

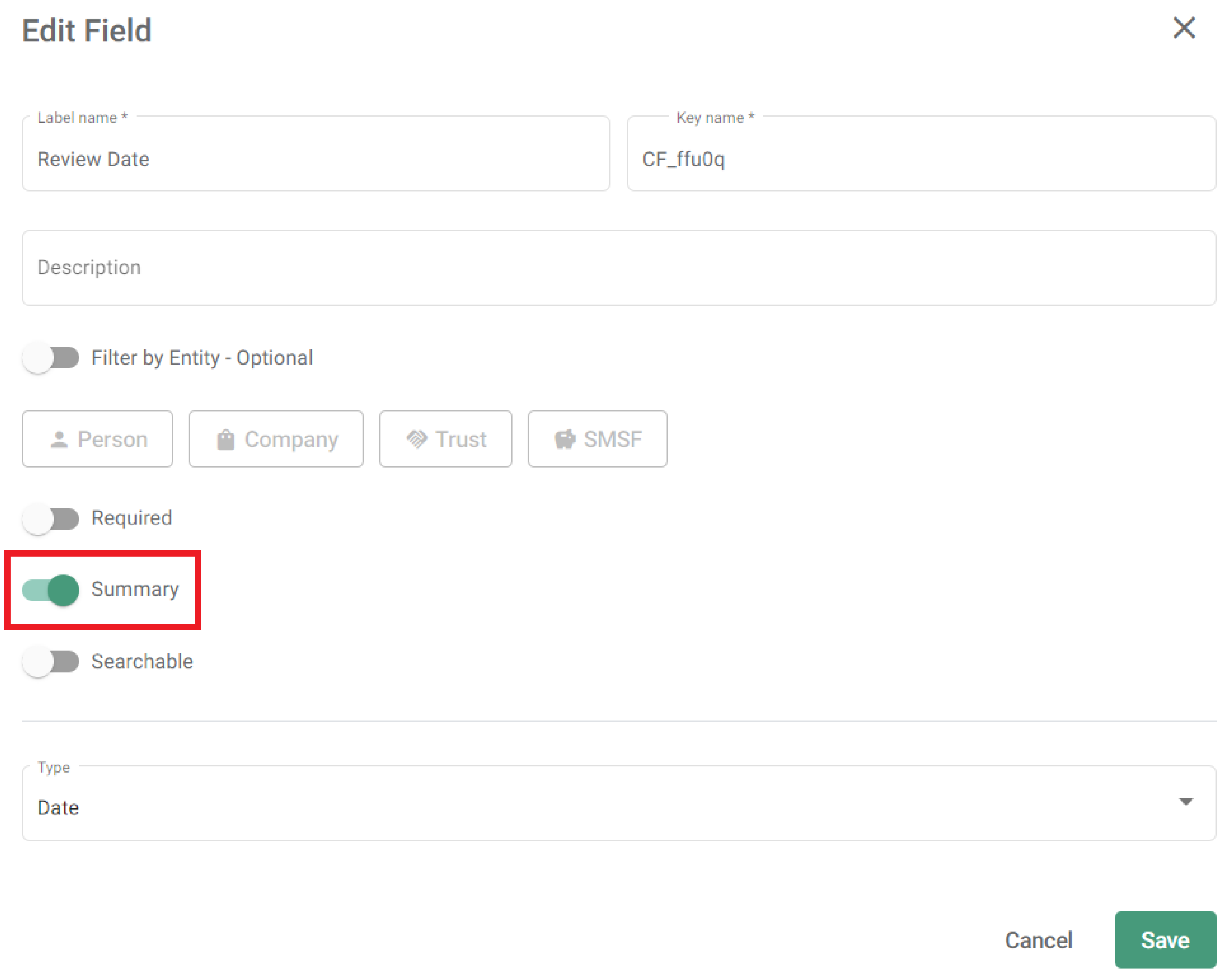
To create custom fields, you will have to click "Add Table" first.



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

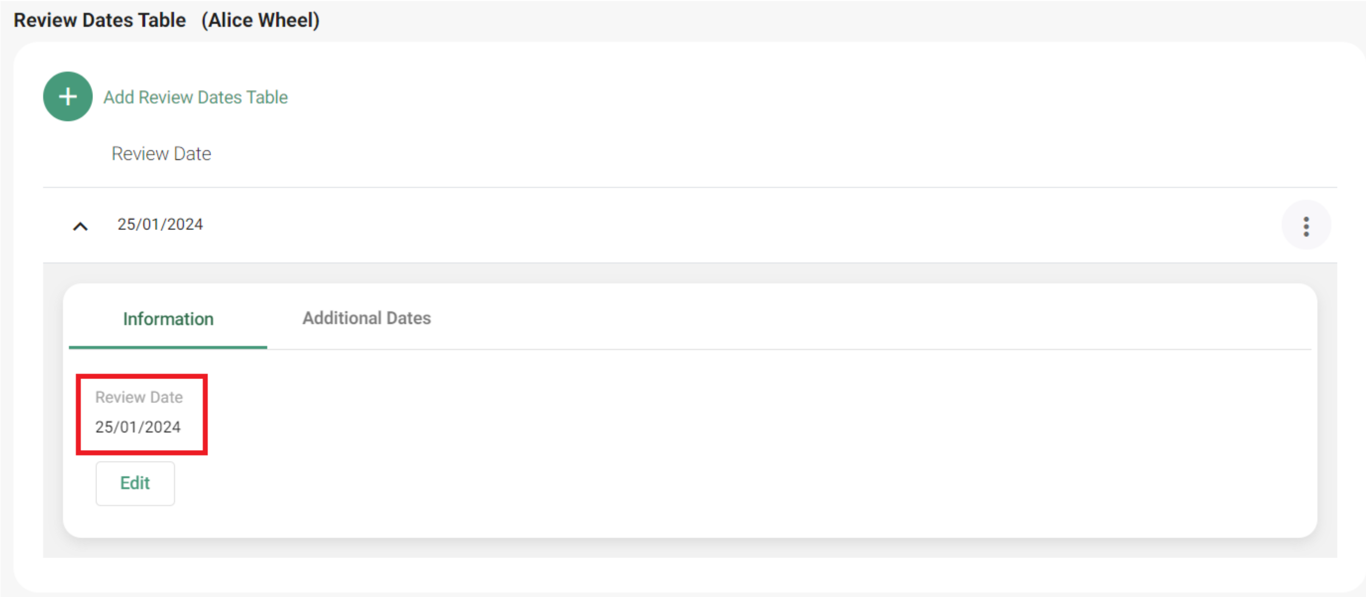


When creating the field in table, you will have to turn on the "Summary" for the fields to show in the table.



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

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



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