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# USER GUIDE Create Custom Tabs, Fields, and Tables

#### Contents

Introduction	2
Create a new Custom Tab	3
Create Custom Fields	5
Create Custom Tables	7

# 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

A	Dashboard		Configurations Email Templates File Note Templates Risk Profile Quest Settings	
Ê	Contacts		Contact Type Custom Fields	
	Documents	~	Person For Accounts	\$
0_	Agreements	~	Company For Contacts	\$
≈=	Tasks	~	SMSF For User profile	۵
Ø	Quest beta	~		
Ē	Store	~	Contact Categories	•
			Active S Archer S Black Service DobTest 1 Advice Docs Applications Authority to Proceed Active Advice Docs Applications Authority to Proceed Active Advice Docs Applications Active Acti	
<b>.</b>	Settings	^	Centrelink & Client File & DynamicDocs & Correspondence & Discovery & Investment meeeting &	
	Accounts		Estate Planning 🔇 Import Test Category 🔇 Insurance 🔇 Meeting Notes 🔇 Research 🔇	
			Investment 🔇 Lead 🔇 Mortgage Broking 🔇	
	Groups		New Business 😵 Ongoing Service 😵 OSA 😵 Platinum 😵	
	System		Platinum Package 🔇 Prospect 🔇 Purge 🔇	
			Service agreement 😢 shared contact category 😢	
			SOA Wizard Test Client 😵 Terminated 😵 Testing 😵	
			Wealth02 😵 WIP 😵 Xplan 😵	

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 * Insurance Review Date	Tab key * CT_insurance_review	
Visibility       Person	SMSF	
	Cancel	Add

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

Insurance Review Date		Draft :
<ul> <li>← CT_insurance_review </li> <li>▲ </li> <li>▲ </li> <li>▲ </li> <li>▲ </li> <li>▲ </li> <li>● </li> <li></li></ul>	Online Hide for partner Share	
Add Section Add Table		Publish 🕤 Discard

- 1. Online -> To make the Tab live in the Contacts' Information Section
- Hide for partner -> This will only show one field for both Client and Partner. For example, Advice Details Section.
- 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		
		h
Display		
Full 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.

Insurance Review Date	Section	⊶ CF_3e27m	* * / :
			🕀 Add Field
			Delete Section

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

Add Field	×
Label name *	Key name *
Review Date	CF_vjxb9
Description	
Filter by Entity - Optional	
😩 Person 🗎 🏠 Company 🖉 Trust	ISF
Required	
Searchable	
Туре	
Date	•
	Cancel Create

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 ③ Please take this tab offline to edit t	ab details
1 🕯 🏶 🖬		Hide for partner	
		Share	
✓ Edit			
✓ Insurance Review Date	Section	o₊ CF_3e27m	.≗ û ⊚ ø

# **Create Custom Tables**

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

Add New Table			×
Table name *	Table key *		
Review Dates Table	CA_review_date		
Table description			
			h
Display			
Full 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.

Review Dates Table	Table	CA_review_date	÷ 🗎 📝 :
			+ Add Field
			Add Table
			Delete 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	
Le Person Company Trust SM	ISF
Required	
Summary	
Searchable	
Туре	
Date	•

Cancel	Save
--------	------

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#### 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	.⊥ û ⊗ ∯	× :
Review Date	date	⊶ CF_ffu0q	. û ⊗ ∯	
∷ 🔨 Additional Dates	Table	⊶ CA_4hcke		× :
Review Comment	text	⊶ CF_cq13j	÷ û ⊗ ∳	× •

#### 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	