Custom fields

Tailor your custom information fields to the agreements for further use for filtering and exports. The "Custom fields" module is described here in several pages regarding purpose, installation, configuration and use.

- The purpose of custom fields
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- Filter custom fields in contract views

The purpose of custom fields

Tailor your own custom information fields to the agreements for further use for filtering and exports.

Agreements sometimes need to be supplemented with information fields that are specific to your company.

With the "Custom fields" module, you can control your own fields to be entered on the agreements. That information can then be used to, among other things:

- Export to Excel
- Filter deal listing via deal views

Screenshot

Known limitations in custom fields

The "Custom fields" module is new in the fall of 2022 and has a number of limitations that we currently do not know if adjustments will be made. These are among others:

- Only 6 simple data types can be used without particularly advanced setups.
- All fields are displayed last in the contract entry and only vertically one after the other.
- Filtering in agreement views only filters hard, so-called "AND" when several filters for own fields are set up.
- Bulk input cannot handle "Custom fields".
- Custom fields cannot be used by other functions such as calculations or reminders.
- Custom fields are not displayed in reports.

These limitations can of course change if demand for functionality is made over time.

Installing custom fields

"Custom fields" is a module that you can subscribe to.

Activate the module by clicking it under "Company settings" in the main menu (top).

Once the subscription is activated, everyone in your company can use "Custom fields" for your contracts.

Read more on the following page how to configure "Custom fields".

Configuring custom fields

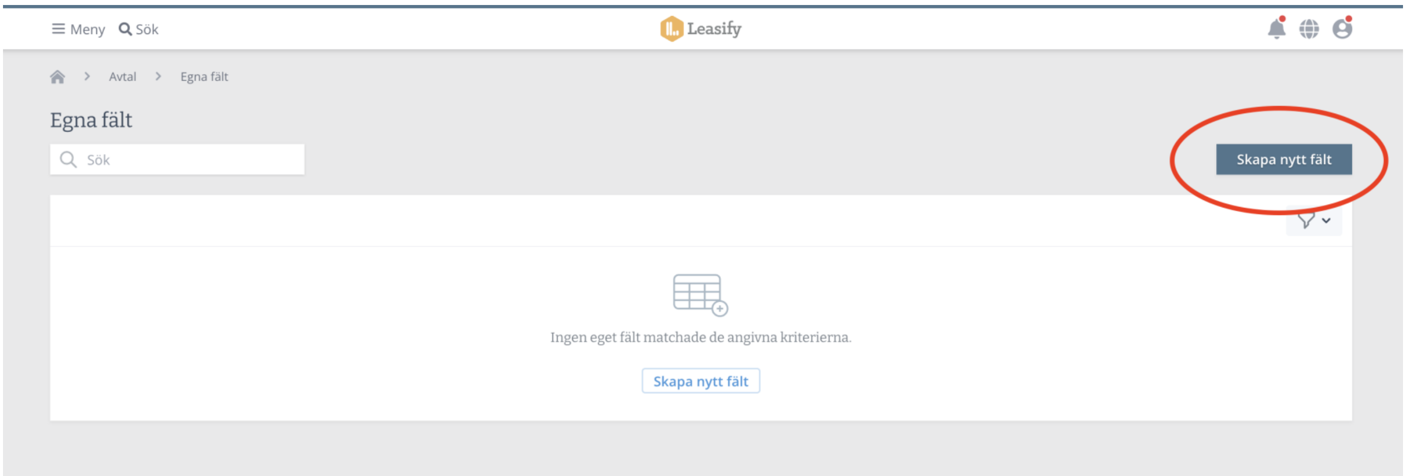
Once the module is activated the top menu will be expanded with the entry to "Custom fields".

When you select "Custom fields" in the menu, you will be taken to a collection page of all fields for your company.

The fields listed there will thus be those that can be filled in later in your contracts.

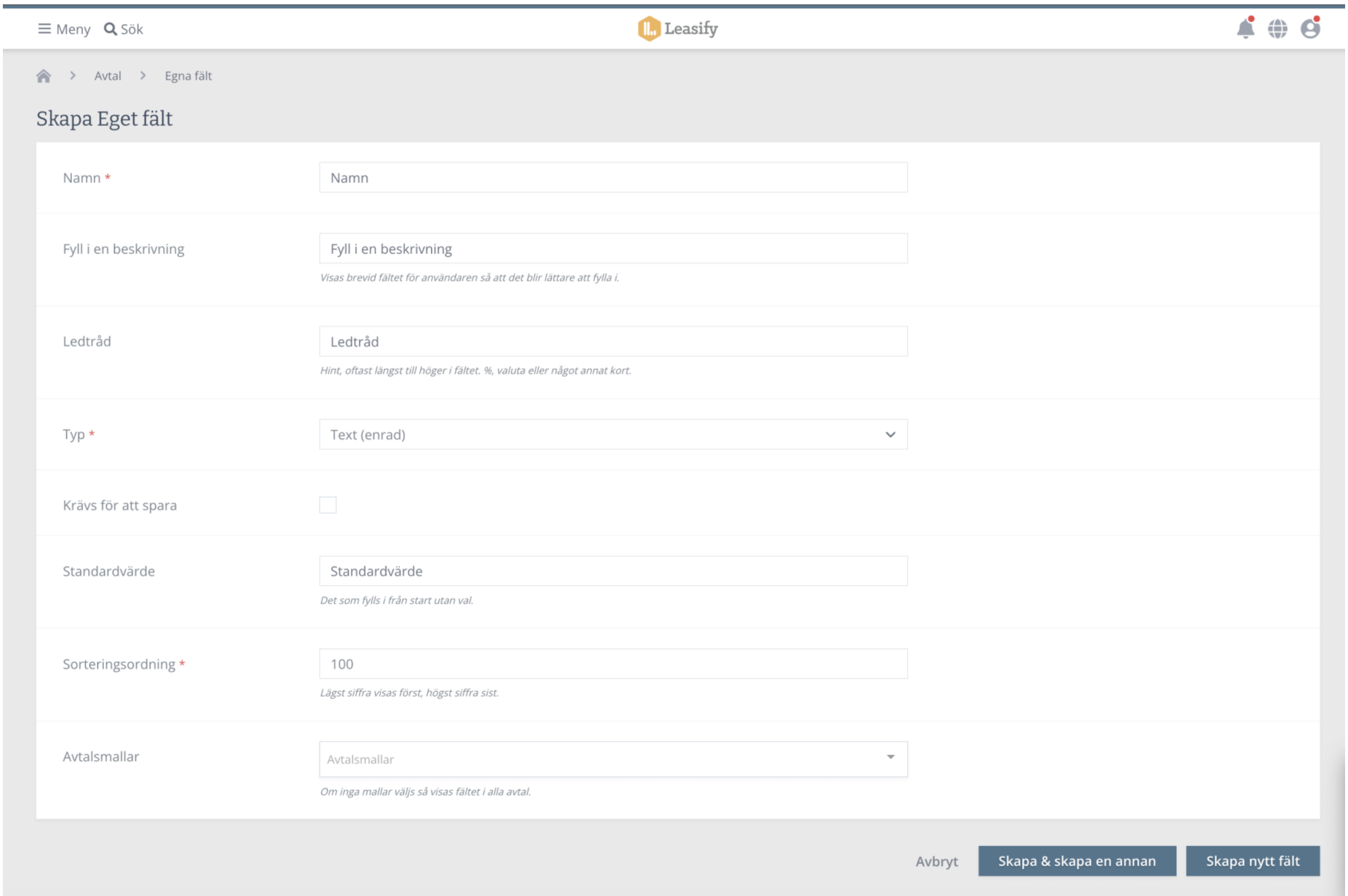
The list can be sorted, modified and removed to adjust the custom fields in your contracts.

Click on "Create new field" to make a new field for your contracts.



The function of the fields are described in the following page.

What needs to be set in a "custom field"



"Name" is what others see as the title of your field when entering something. This is required to save the field.

"Description" is used to give the user a description of what the field requires. Can be a line of information about what is to be filled in in the own field out in the contract entry.

"Hint" appears as text to the right of the input field. For example, it can be a percent sign, currency code or some short unit to help the user with input. A kind of "hint".

"Type" is the data type to be entered. There are a number of different data types to choose from:

- Text (single line) is free text, any characters.
- Text (several lines) is a paragraph or mass of text to be entered.
- Number is a number where no letters may be entered by the user.
- Yes/No is a checkbox for the user to check or uncheck.

- Drop-down list is a number of predefined rows (key with value) that the user can choose from.
- Date is a day to choose from a free calendar.

"Required to save" will require the user to a response in order to save the agreement at all.

"Default value" is the value that is filled in from the start of a new agreement to help.

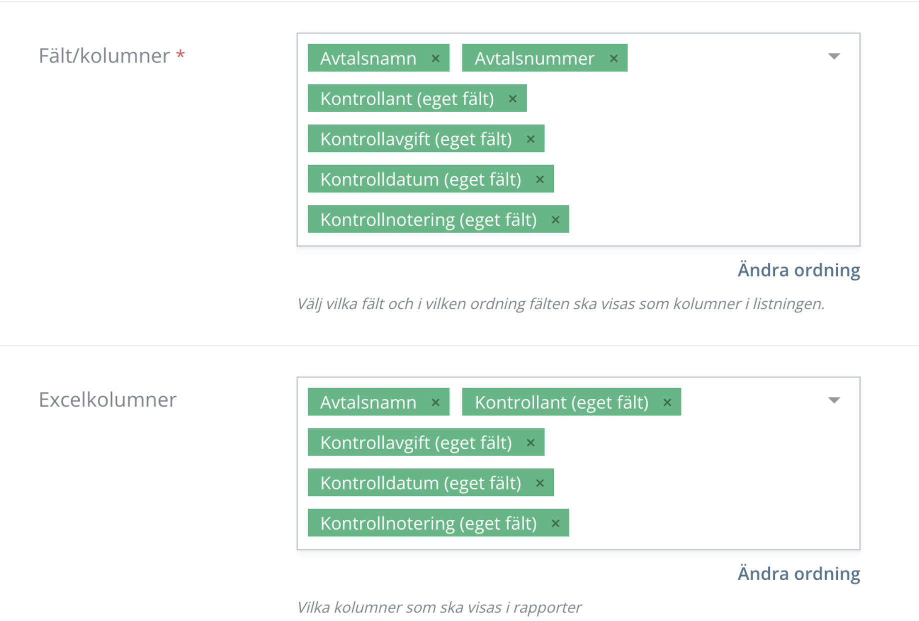
"Sorting order" determines the order in which the field is displayed in the entry of the agreement. Lowest number comes first. Tip! Get into the habit of always using decades (10s) so that you can "squeeze in" other options more easily later.

"Agreement templates" filters the field to only one or more types of agreement templates.

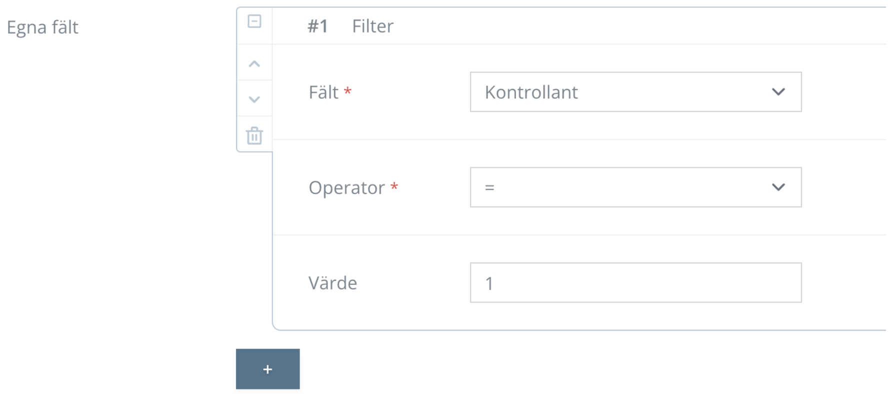
Filter custom fields in contract views

Contract views can be expanded with the fields you have entered in the "Custom fields" list.

They can be used both in listings and in Excel exports.



The contract views can also filter out specific values from their own fields.



Select the plus button to add fields for filtering. Next, three things must be set per filter:

- "Field" to select which field to use for the filter.
- "Operator" to tell how the comparison should take place.

- "Value" is used with the field and operator.

In the example above, filtering will take place so that the agreements in the view only show those agreements that have "Controller" selected to "1".