



# Custom Fields

2017 - Winter Edition

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## Overview

**Custom Fields** are designed as a club specific solution to gathering additional information on particular instances of the Office system. Specifically, **Custom Fields** can be created to gather additional information on Members, Employees, and Vendors. The Office system has the capability to create various types of **Custom Fields** including Choice, Date, Number, Text, Yes/NO, and Group.

## Use Case(s)

- The club would like to track the age of their Members when they joined the club.
- The club would like to track the Education of a club's employees.
- The Club would like to track the brand of woods a Vendor sells.

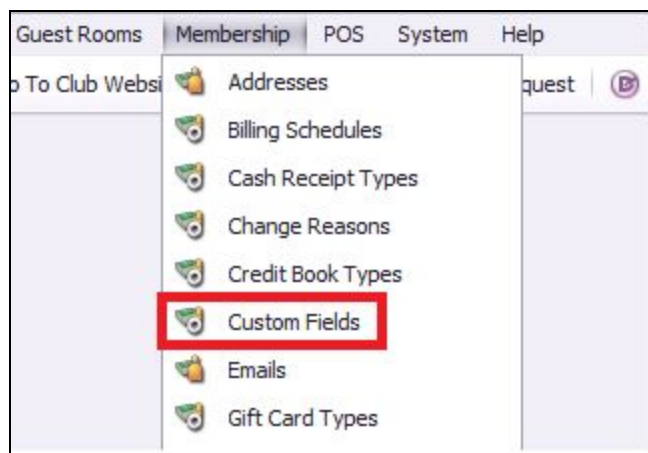
## Accessing the Tool

Please see instructions below to access **Custom Fields** within each available module.

### Membership

To access Custom Fields specific to **Members**:

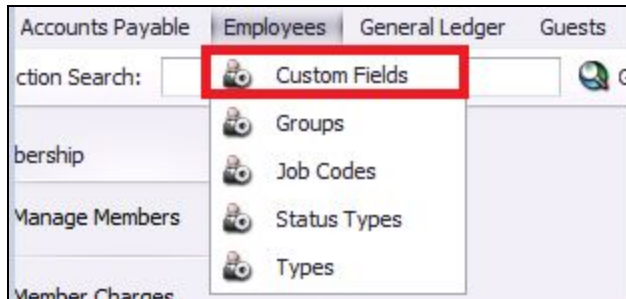
Select **Membership** across the top toolbar and choose **Custom Fields**.



## Employees

To access Custom Fields specific to **Employees**:

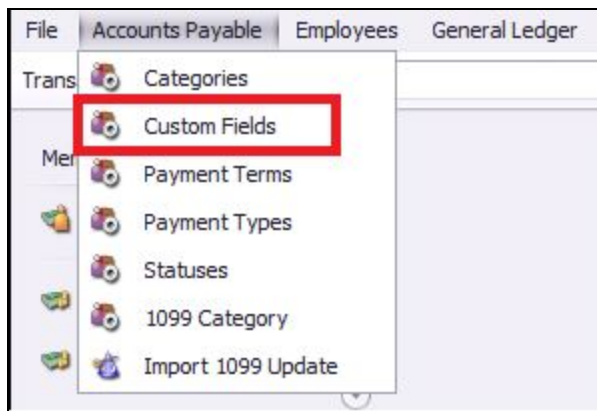
Select **Employees** across the top toolbar and choose **Custom Fields**.



## Vendors

To access Custom Fields specific to **Vendors**:

Select **Accounts Payable** across the top toolbar and choose **Custom Fields**.



## Custom Fields Grid

A **Custom Fields Grid** will launch, specific to the selected module, when either of these options are selected. These Grids can be filtered, and exported to excel in the same manner as any Grid within the Office system.



Required	Name	Description	Data Type
<input type="checkbox"/>	<b>Rental Items</b>	<b>Locker</b>	<b>Text</b>
<input type="checkbox"/>	Food Preferences		Choice
<input type="checkbox"/>	Member Deposit		Number
<input type="checkbox"/>	Guest Passes		Number
<input type="checkbox"/>	Committee Service	Committee Service	Choice
<input type="checkbox"/>	Boat Name		Text
<input type="checkbox"/>	Lot #	HOA Lot Number	Number
<input type="checkbox"/>	Date Bcm Reg	Date became regular ...	Date
<input type="checkbox"/>	Senior Date	Date eligible for senio...	Date
<input type="checkbox"/>	Cert Number	Regular Certificate Nu...	Number
<input type="checkbox"/>	Age Joined	Age when first joined	Number
<input type="checkbox"/>	Social Security	Social Security Number	Number

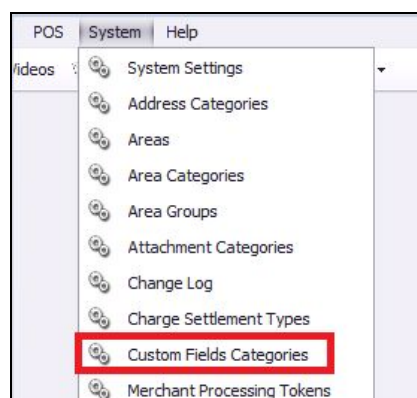
## Custom Fields Categories

**Please Note:** Selecting a Custom Fields Category is required during the setup of a Custom Field.

This allows the user to classify their Custom Fields for easy reporting.

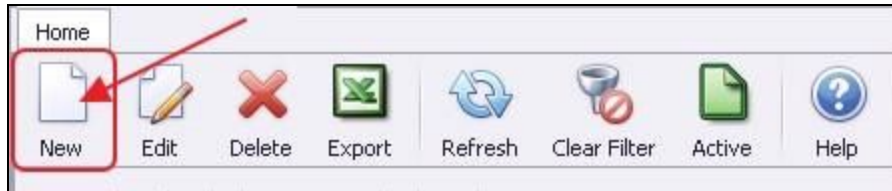
To create a **Custom Fields Category**:

- 1) Navigate to **System** across the top toolbar and select **Custom Fields Categories**.

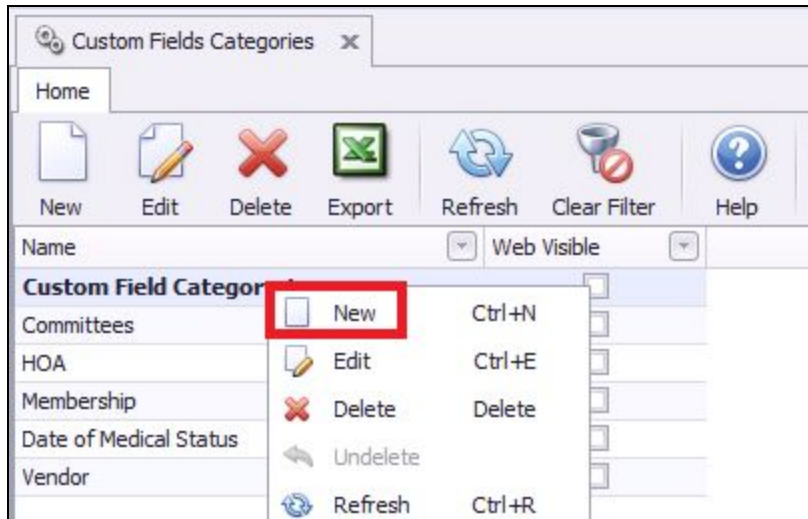


2) Then, perform either of the following to launch the **Custom Fields Categories** setup screen:

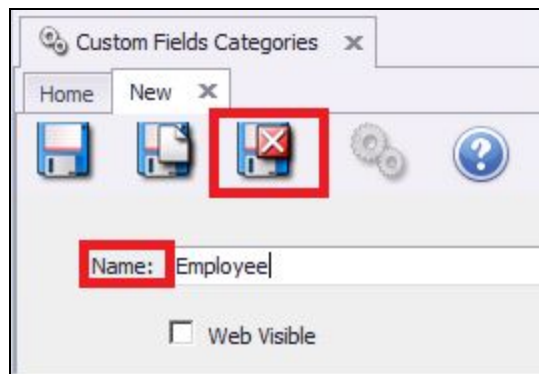
a. Click the **New** icon on the toolbar.



b. Right Click anywhere on the **Custom Fields Categories Grid** and select **New**.



3) Give the new Custom Fields Category a **name** and **Save & Close**. **Web Visibility** is only applicable to clients still using **CSWeb**.



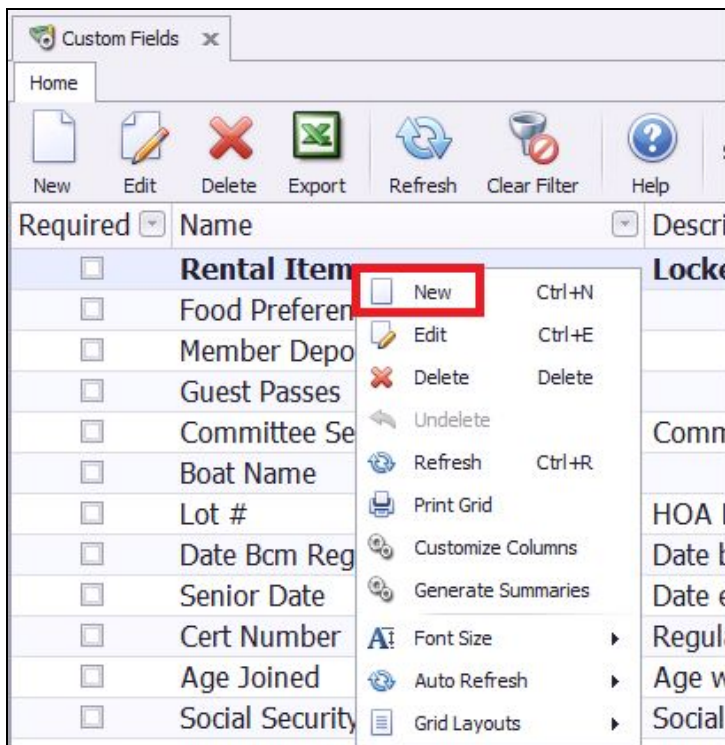
# Create a New Custom Field

To create a new **Custom Field**:

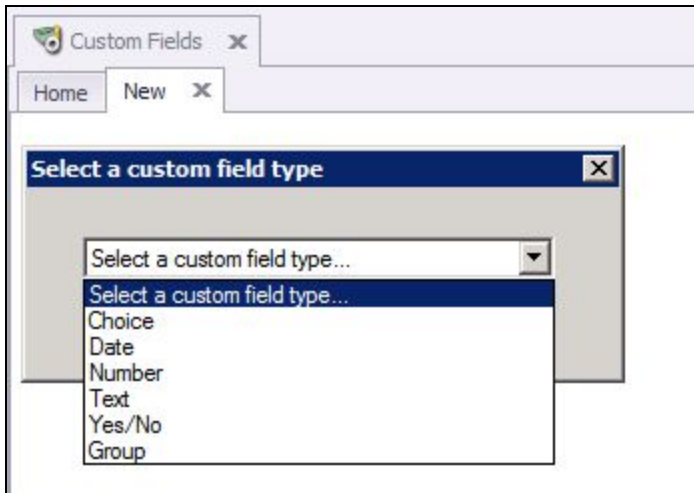
- 1) Navigate to the corresponding **Custom Fields Grid**, specific to the module the user is entering the new Custom Field.
- 2) Then, perform either of the following to launch the **Custom Fields** setup screen:
  - a. Click the **New** icon on the toolbar.



- b. Right Click anywhere on the **Custom Fields Grid** and select **New**.



- 3) The **Custom Fields** setup screen will launch. Select the **Type** of Custom Field that is being entered.



## Custom Fields Types

Please see below instructions on each **Type** of Custom Field.

### Choice

A **Choice** Custom Field creates a selection option within the specific instance of the Office system the Custom Field is created.

Please see instruction below:

**Name** - label that will display for the Custom Field.

**Category** - select the **Custom Fields Category**.

**Description** - additional information about the Custom Field.

**Display Order** - used to put the Custom Field in order on the Custom Field screen within the specific module the Custom Field was created.

**Type** - used to determine if the field will accept more than one selection.

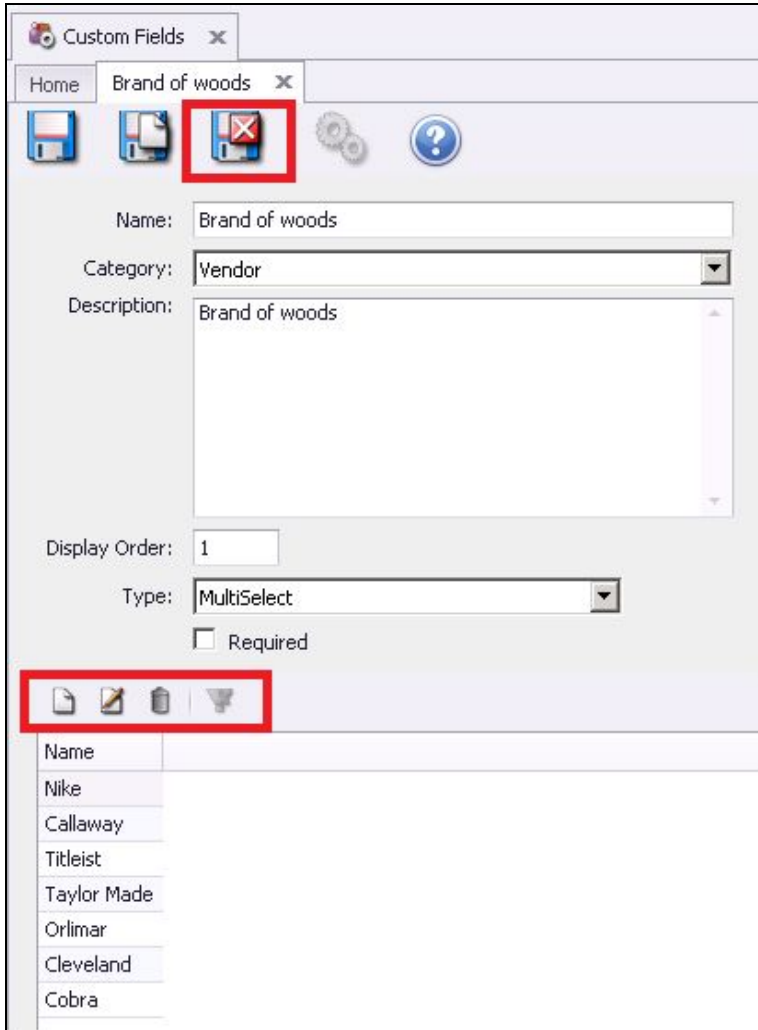
**MultiSelect**- more than one can be selected. When selecting **multiple** instances, please be sure to hold **CTRL** on the keyboard.

**SingleSelect**- only one can be selected.

**Required-** will make the Custom Field a required field when entering a new member.

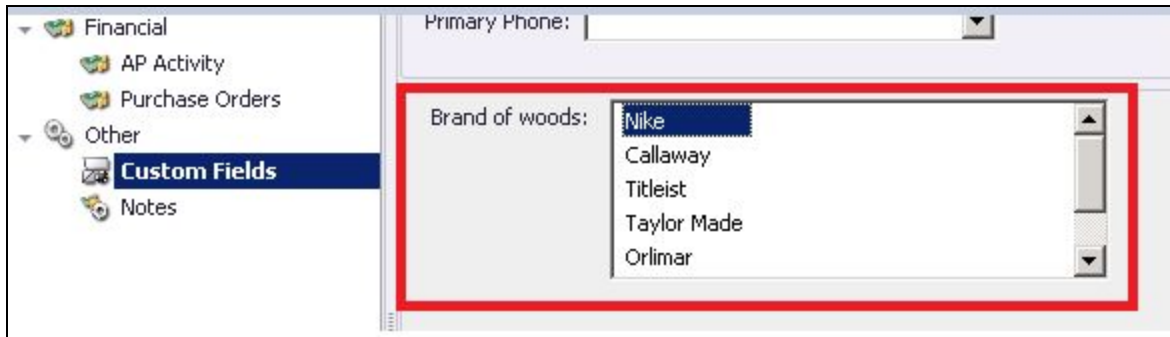
**Add Selections-** the selection options are added and edited using the New, Edit and Delete icons at the bottom of the screen.

Be sure to **Save & Close** the Custom Field when complete.



The new Custom Field will display on the **Custom Field Tab** within the specific module the Custom Field was created.





## Date

Date **Custom Fields** are used to store additional information in a date format.

**Name** - label that will display for the Custom Field.

**Category** - select the Custom Fields **Category**.

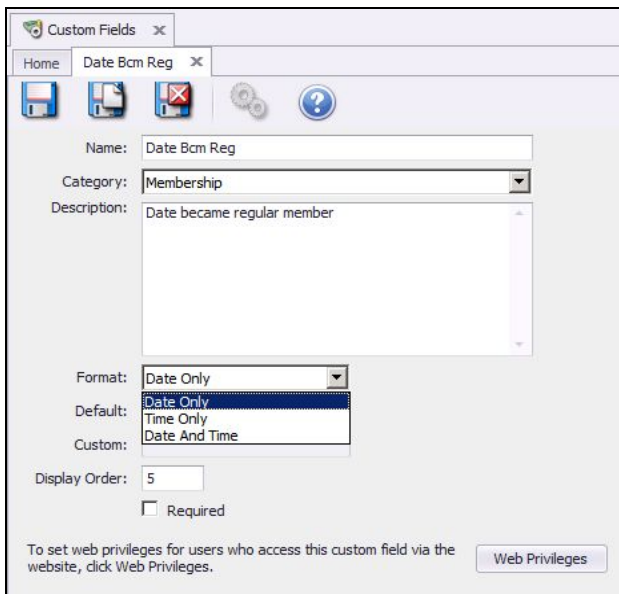
**Description** - additional information about the Custom Field.

**Format** - used to set the specific format for the **Custom Field**.

**Date Only** - will only accept date entry

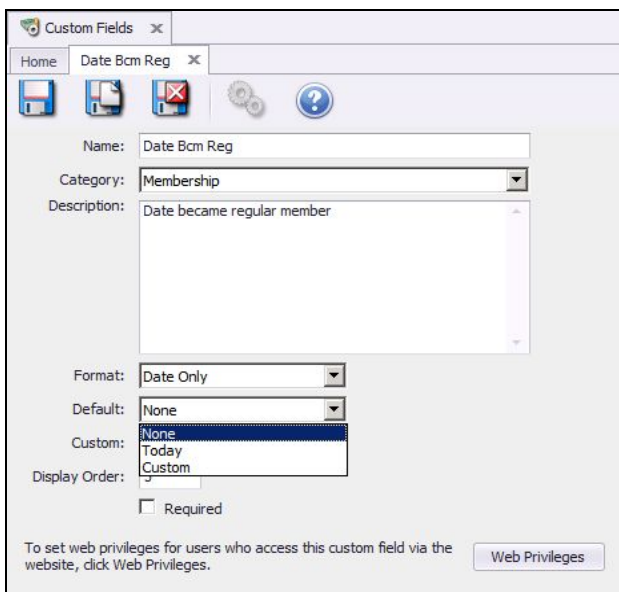
**Time Only** - will only accept time entry

**Date and Time** - will accept date and time entry



The screenshot shows the 'Custom Fields' configuration window for a field named 'Date Bcm Reg'. The 'Category' is set to 'Membership' and the 'Description' is 'Date became regular member'. The 'Format' dropdown is set to 'Date Only'. The 'Default' dropdown is open, showing 'Date Only' selected, with 'Time Only' and 'Date And Time' as other options. The 'Display Order' is 5, and the 'Required' checkbox is unchecked. A 'Web Privileges' button is at the bottom right.

**Default-** used to auto fill the Custom Field, but can be overwritten.



The screenshot shows the 'Custom Fields' configuration window for the same field. The 'Format' is still 'Date Only'. The 'Default' dropdown is now set to 'None'. The 'Custom' dropdown is open, showing 'None', 'Today', and 'Custom' as options, with 'Custom' selected. The 'Display Order' is 5, and the 'Required' checkbox is unchecked. A 'Web Privileges' button is at the bottom right.

**Today** - new vendor will default to creation day for this field.

**Custom** - will default with entry in Custom field below.

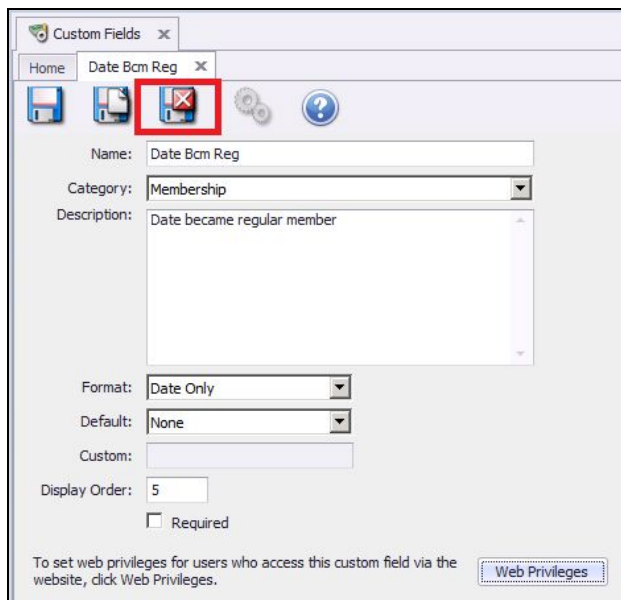
**Custom** - When default is set to Custom, set the custom date to be entered. Date format is month, day, year (XX/XX/XXXX).

**Display Order** - used to put Custom Fields in order on the Custom Field screen within the specific module the **Custom Field** was created.

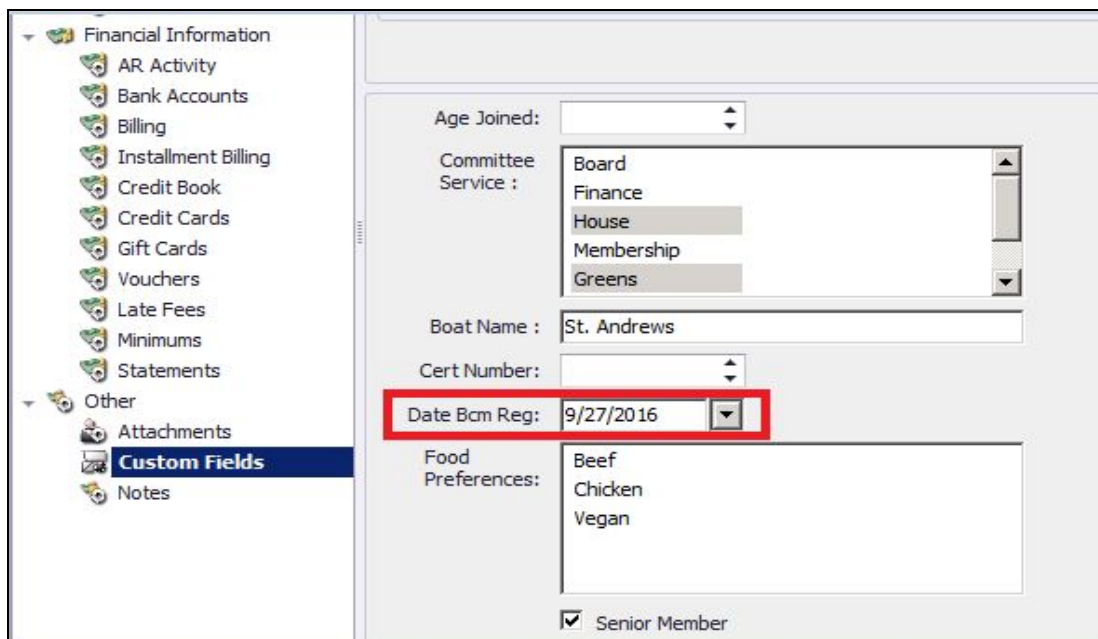
**Required** - will make the Custom Field a required field when entering a new member.

**Web Privileges** - Only applicable if client still uses CSWeb.

Be sure to **Save & Close** the Custom Field when complete.



The new Custom Field will display on the **Custom Field Tab** within the specific module the Custom Field was created.



## Number

**Number** Custom Fields are used to store additional numeric data.

**Name** - label that will display for the Custom Field.

**Category** - select the Custom Fields **Category**.

**Description** - additional information about the Custom Field.

**Display Order** - used to put Custom Fields in order on the Custom Field screen within the specific module the **Custom Field** was created.

**Max** - maximum value, example: entry of 150 means that the field will only accept an entry of 150 or lower

**Min** - minimum value, example: entry of 1 means that the field will only accept an entry of 1 or higher

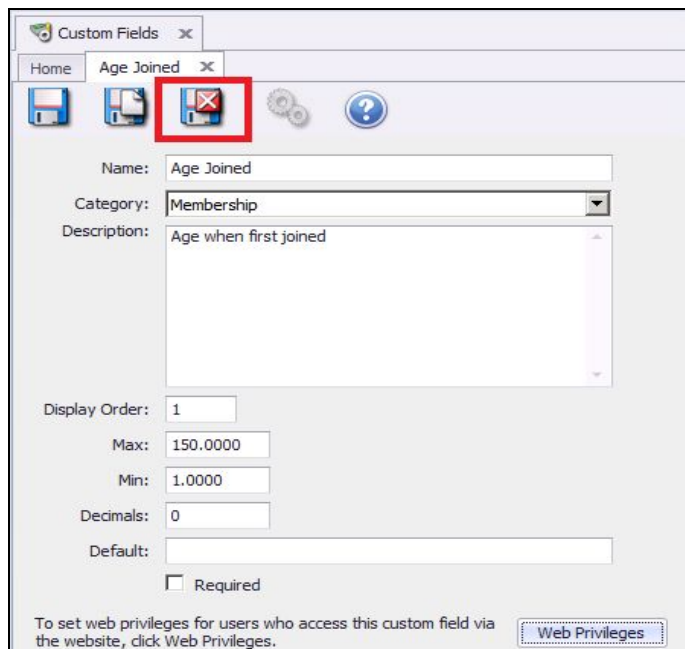
**Decimals** - number of decimal places that can be entered for the numeric value. Must be between 0 and 10.

**Default** - used to auto fill the Custom Field, but can be overwritten.

**Required** - will make the Custom Field a required field when entering a new member.

**Web Privileges** - Only applicable if client still uses CSWeb.

Be sure to **Save & Close** the Custom Field when complete.

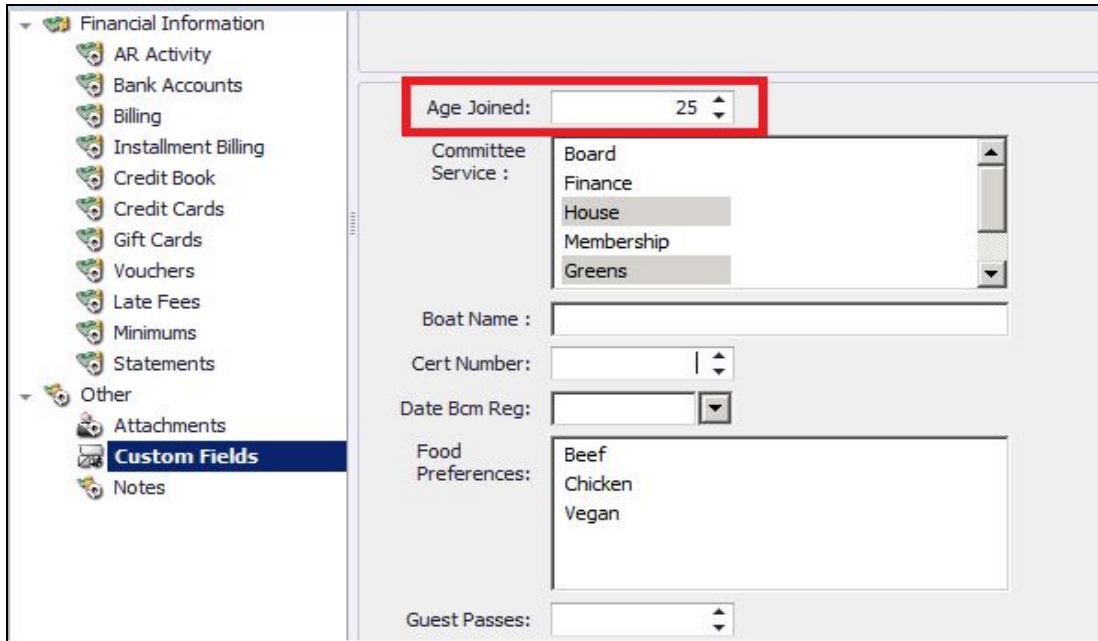


The screenshot shows a web browser window titled "Custom Fields" with a sub-tab for "Age Joined". The interface includes a toolbar with icons for Home, Save, Save & Close (highlighted with a red box), Settings, and Help. The configuration form contains the following fields:

- Name: Age Joined
- Category: Membership (dropdown menu)
- Description: Age when first joined (text area)
- Display Order: 1
- Max: 150.0000
- Min: 1.0000
- Decimals: 0
- Default: (empty text field)
- Required:

At the bottom, there is a note: "To set web privileges for users who access this custom field via the website, click Web Privileges." and a "Web Privileges" button.

The new Custom Field will display on the **Custom Field Tab** within the specific module the Custom Field was created.



The screenshot shows a software interface with a left-hand navigation menu and a main content area. The navigation menu includes categories like 'Financial Information', 'Other', and 'Custom Fields' (which is highlighted). The main content area displays several form fields: 'Age Joined' (a spinner box with '25' and a red highlight), 'Committee Service' (a list box with options: Board, Finance, House, Membership, Greens), 'Boat Name' (a text box), 'Cert Number' (a spinner box), 'Date Bcm Reg' (a dropdown menu), 'Food Preferences' (a list box with options: Beef, Chicken, Vegan), and 'Guest Passes' (a spinner box).

## Text

**Text** Custom Fields are used to store additional information in simple text format.

**Name** - label that will display for the Custom Field.

**Category** - select the Custom Fields **Category**.

**Description** - additional information about the Custom Field.

**Display Order** - used to put Custom Fields in order on the Custom Field screen within the specific module the **Custom Field** was created.

**MaxChars** - limits the number of characters that can be used in the Custom Field

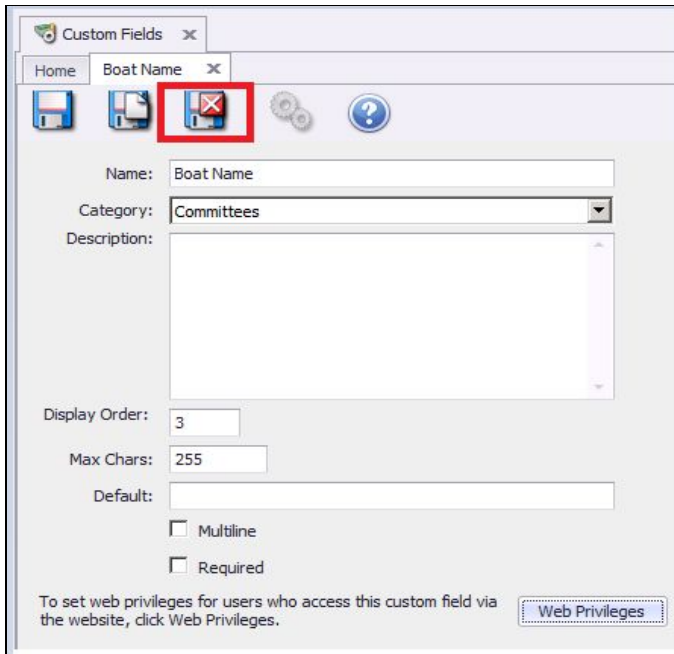
**Default** - used to auto fill the Custom Field, but can be overwritten.

**Multiline** - used to allow multiple lines for entry.

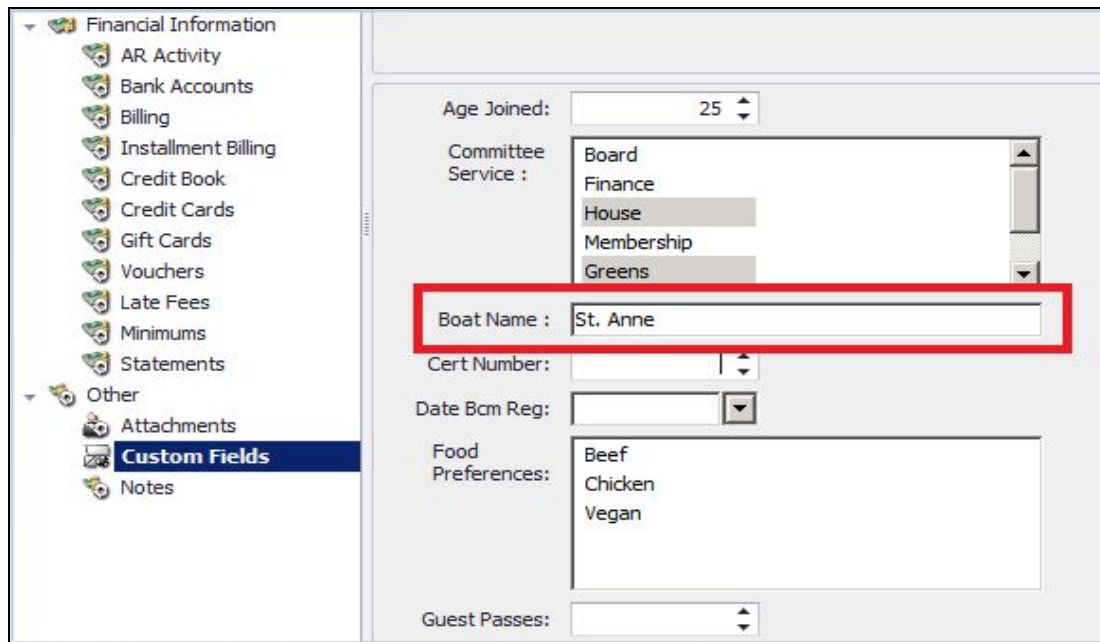
**Required** - will make the Custom Field a required field when entering a new member.

**Web Privileges** - Only applicable if client still uses CSWeb.

Be sure to **Save & Close** the Custom Field when complete.



The new Custom Field will display on the **Custom Field Tab** within the specific module the Custom Field was created.



Yes/No

Used for storing **Yes or No** information. Creates a checkbox for the user to check for yes or leave unchecked for no.

**Name** - label that will display for the Custom Field.

**Category** - select the Custom Fields **Category**.

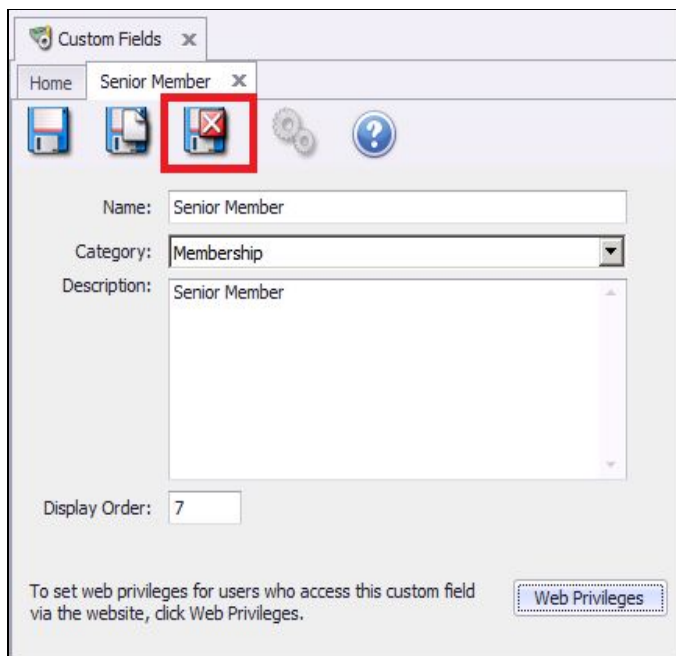
**Description** - additional information about the Custom Field.

**Display Order** - used to put Custom Fields in order on the Custom Field screen within the specific module the **Custom Field** was created.

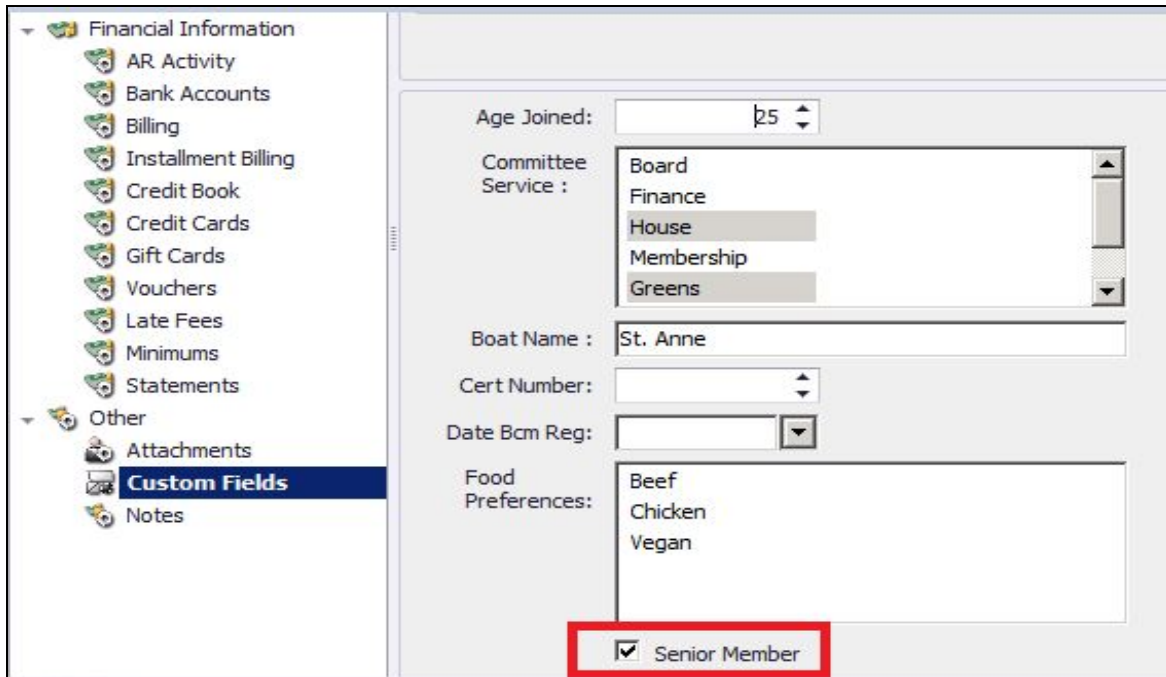
**Default** - used to auto fill the Custom Field, but can be overwritten.

**Web Privileges** - Only applicable if client still uses CSWeb.

Be sure to **Save & Close** the Custom Field when complete.



The new Custom Field will display on the **Custom Field Tab** within the specific module the Custom Field was created.



The screenshot shows a software interface with a sidebar on the left containing a tree view of modules. The 'Custom Fields' module is selected and highlighted in blue. The main content area displays a form with the following fields:

- Age Joined: 25
- Committee Service: A list box containing 'Board', 'Finance', 'House' (highlighted), 'Membership', and 'Greens'.
- Boat Name: St. Anne
- Cert Number: (empty)
- Date Bcm Reg: (empty)
- Food Preferences: A list box containing 'Beef', 'Chicken', and 'Vegan'.
- At the bottom, a checkbox labeled 'Senior Member' is checked and highlighted with a red rectangular box.

## Group

This Type is used to group several types of Custom Fields into one section within the specific module the **Custom Field** is entered.

**Name** - label that will display for the Custom Field.

**Category** - select the Custom Fields **Category**.

**Description** - additional information about the Custom Field.

**Display Order** - used to put Custom Fields in order on the Custom Field screen within the specific module the **Custom Field** was created.

**Group Type** - used to determine if only one group can be added per instance or if more than one group can be added

**Single** - only one group of these Custom Fields will be in the specific module the **Custom Field** is entered.

**Multiple** - initially one group will display in the specific module the **Custom Field** is entered, but an **Add** button will be available to add as many as needed to keep all of the information for that particular instance.



**Required** - will make the Custom Field a required field when entering a new member.

**Add Selections** - the selection options are added and edited using the New, Edit and Delete icons at the bottom of the screen

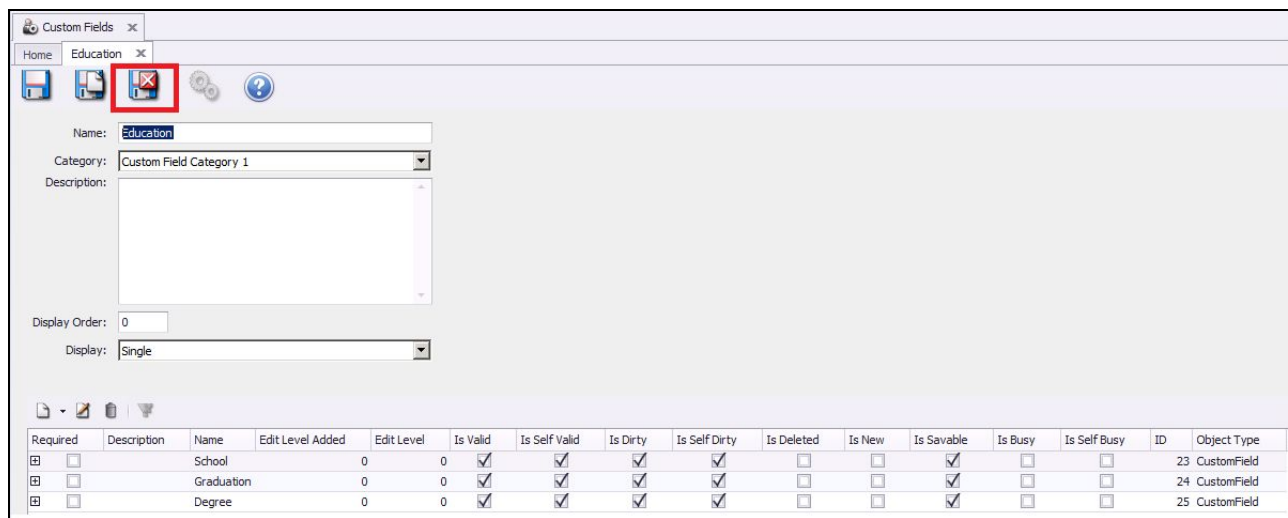
To **add** a new selection:

Click **New** with the Down Arrow

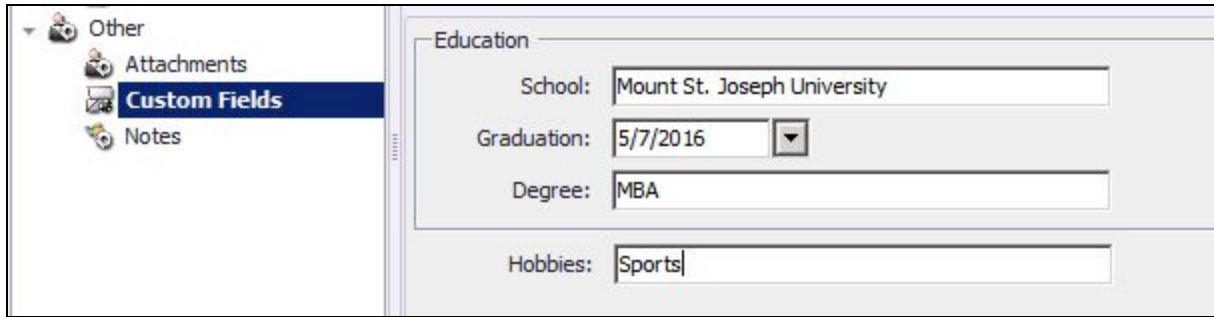
- 1) Select the Custom Field Type
- 2) Fill in the entry screen based on the information provided on the different types above.
- 3) Save and Close

**Web Privileges:** Only applicable if client still uses CSWeb.

Be sure to **Save & Close** the Custom Field when complete.



The new Custom Field will display on the **Custom Field Tab** within the specific module the Custom Field was created.



The screenshot shows a web interface with a sidebar on the left containing 'Other', 'Attachments', 'Custom Fields', and 'Notes'. The 'Custom Fields' section is selected. The main area displays a form with the following fields:

- Education: School: Mount St. Joseph University
- Graduation: 5/7/2016 (dropdown menu)
- Degree: MBA
- Hobbies: Sports

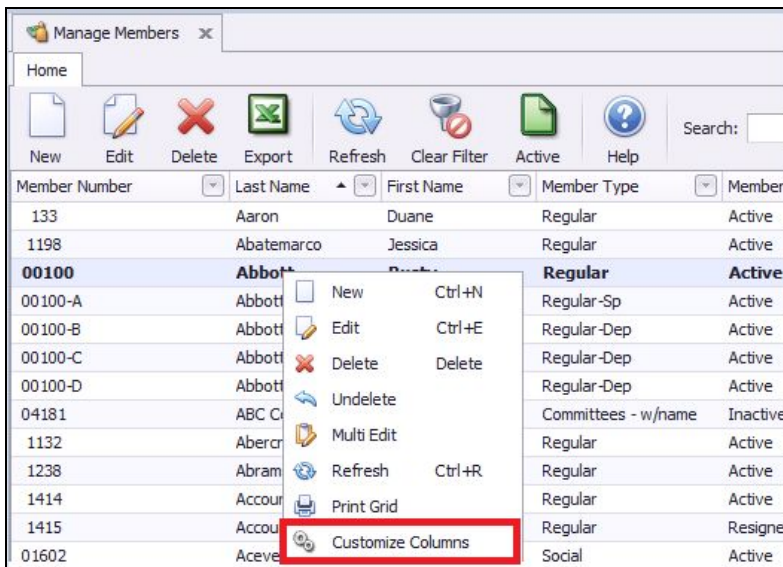
## Custom Fields Reporting

Reporting on Custom Fields is most efficient when using **Grids**. Once a Custom Field is created, the Custom Field becomes an available column option within the specific module the Custom Field is created.

For example, assume a club created a Membership Custom Field titled, **Age Joined**. The primary goal of this Custom Field is to track the age of their members when they joined the club.

To create a **report** displaying this information:

- 1) Navigate to the **Manage Members Grid**.
- 2) Right click on the grid and select **Customize Columns**.



- 3) The newly added Custom Field is now an available column option. Double click or drag and drop the column.



- 4) The column is now on the grid and can be filtered and exported to Excel the same as any other column.

A screenshot of the "Manage Members" application interface. The interface includes a toolbar with icons for New, Edit, Delete, Export, Refresh, Clear Filter, Active, and Help. A search box is present with radio buttons for "All Words" and "Any Word". Below the toolbar is a table with the following columns: Member Number, Last Name, First Name, Member Type, Member Status, and Age Joined (Custom Field). The "Age Joined (Custom Field)" column header is highlighted with a red rectangular box. The table contains several rows of member data.

Member Number	Last Name	First Name	Member Type	Member Status	Age Joined (Custom Field)
133	Aaron	Duane	Regular	Active	22
1198	Abatemarco	Jessica	Regular	Active	40
<b>00100</b>	<b>Abbott</b>	<b>Rusty</b>	<b>Regular</b>	<b>Active</b>	<b>35</b>
00100-A	Abbott	Sara	Regular-Sp	Active	41
00100-B	Abbott	Jackson	Regular-Dep	Active	14
00100-C	Abbott	Olivia	Regular-Dep	Active	10
00100-D	Abbott	David	Regular-Dep	Active	7

## Best Practices

- Make sure to always save and close when finished editing the custom field.
- It is required to select a Custom Fields Category during the setup of a Custom Field.