

Add a Custom Field

1. In Admin, click **Service Request Category Custom Fields** or **Work Order Category Custom Fields** from the **Configure** tab.
2. Select the category from the **Categories** panel that you'd like to add a custom field to.
3. Click **Add record** in the **Category Details** panel.

The screenshot shows the 'Category Details' panel. It has a header 'Category Details' with an up arrow. Below the header, there are two input fields: 'Name' (with a character count of 16 / 30) and 'Id' (with a value of 40). The 'Name' field contains 'ELECTRIC REPAIRS'. Below these is a 'Description' field (with a character count of 26 / 250) containing 'Electric Repair Workorders'. At the bottom, there is a 'Custom Fields' section with a 'Field Id' column. It shows a table with one row: 'DIG-INS DUE TO MISLOCATES' with a value of 201. A red box highlights the '+' icon in the 'Custom Fields' section, which is used to add a new custom field.

4. Enter the **Field Name** and click **Add**.
5. Select the **Type**, either **Text**, **Code**, **Date**, or **Numeric**.
6. Enter the corresponding details for the type selected.

The screenshot shows the 'Custom Fields' panel. It has a header 'Custom Fields' with an up arrow. Below the header, there is a table with one row: 'DIG-INS DUE TO MISLOCATES' with a value of 201. A red box highlights the '+' icon in the table. Below the table, there are several input fields: 'Name' (with a character count of 25 / 100) containing 'DIG-INS DUE TO MISLOCATES', 'Id' (with a value of 201), 'Type' (a dropdown menu set to 'Code'), 'Required' (a checked checkbox), 'Visible' (a checked checkbox), 'Code' (a dropdown menu set to 'Y/N Look Up for Custom Fields'), 'Display' (a dropdown menu set to 'Code'), 'Default Value' (a dropdown menu), and 'Link Field' (a dropdown menu with a character count of 0 / 50).

7. To associate a custom field to a work order or service request, return to the **Home Menu** and click **Work Activity Templates** from the **Configure** tab.
8. Select either **Service Request Template** or **Work Order Template** from the **Work Activity Templates** panel.
9. Select a template.
10. Select the **Custom Field Category** on the **General** tab of the **Template Details** panel.

The screenshot shows the 'Template Details' panel. It has a header 'Template Details' with an up arrow. Below the header, there are several tabs: 'GENERAL', 'TEMPLATE ACTIVITIES', 'ELM', 'ASSET AND MAP', and 'SECURITY'. The 'GENERAL' tab is selected. Below the tabs, there are several input fields: 'Id' (with a value of 13557), 'Description' (with a character count of 16 / 60) containing 'Monument Install', 'Is Active' (a checked checkbox), 'Category' (a dropdown menu set to 'General'), 'Priority' (a dropdown menu set to 'Medium'), 'Account' (a dropdown menu set to 'Cemetery Endowment Fund'), 'Shop' (a dropdown menu), and 'Custom Field Category' (a dropdown menu). A red box highlights the 'Custom Field Category' dropdown menu.

When the service request or work order is created, the custom field appears in the **Custom Fields** panel.

The screenshot shows the 'Custom Fields' panel. It has a header 'Custom Fields' with an up arrow. Below the header, there is a table with one row: 'DIG-INS DUE TO MISLOCATES' with a value of 201. A red box highlights the '+' icon in the table. Below the table, there are several input fields: 'Name' (with a character count of 25 / 100) containing 'DIG-INS DUE TO MISLOCATES', 'Id' (with a value of 201), 'Type' (a dropdown menu set to 'Code'), 'Required' (a checked checkbox), 'Visible' (a checked checkbox), 'Code' (a dropdown menu set to 'Y/N Look Up for Custom Fields'), 'Display' (a dropdown menu set to 'Code'), 'Default Value' (a dropdown menu), and 'Link Field' (a dropdown menu with a character count of 0 / 50).