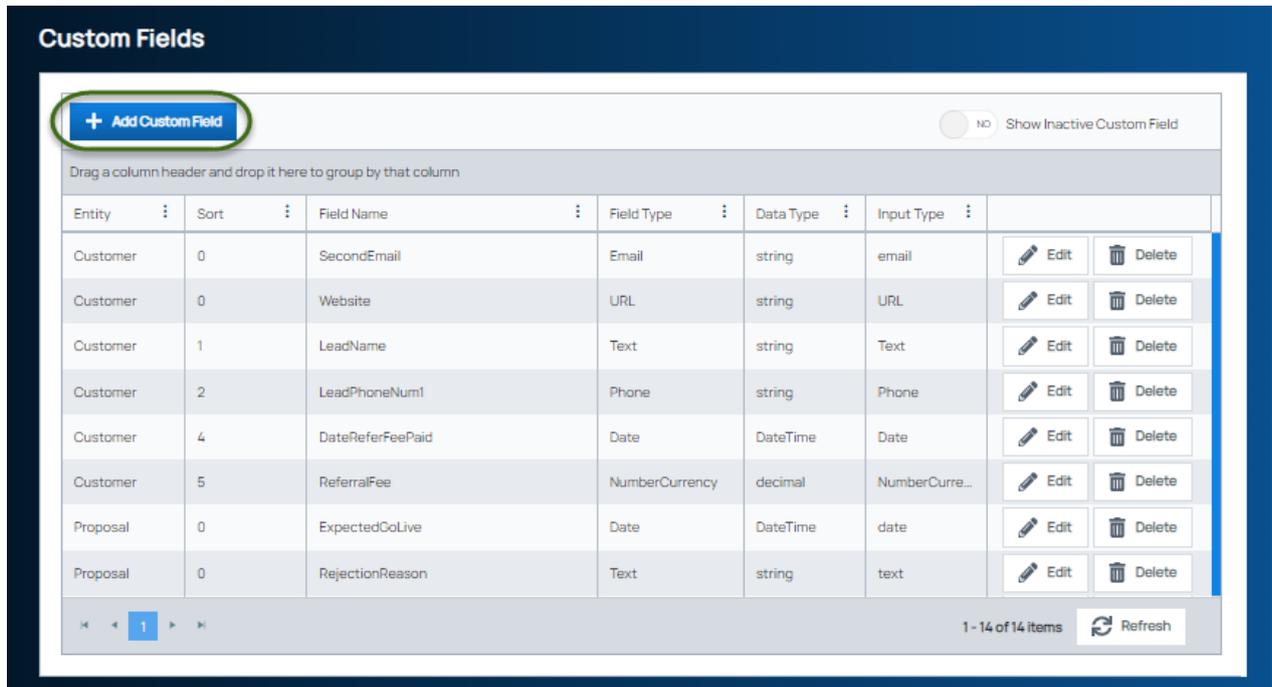


# Add a Custom Field

Last Modified on 04/29/2022 6:13 pm EDT

To setup Custom Fields, from the main menu, arrive at the Custom Fields setup with this path: Setup > Operations > Custom Fields.

The Custom Fields list will be displayed. Click on the Add Custom Field button at the upper left of the form.



The Custom Field form will be displayed. Each data entry field will be described below.

Entity Name: Please Select  
Field Type: Number (Currency)  
Field Name: ReferralFee  
Sort order: 5  
Mask: Mask  
Validation: Validation  
Grid Width: 0  
Save Cancel

## Data Entry Fields

Data entry fields preceded with an asterisk are required.

- **\*Entity Name** – Select from the drop-down list where the custom field will be used: Customer, Site, System, RMR, Work Order, or Proposal.

- **\*Field Type** – Select the field type – how the field is formatted.
- **\*Field Name** – Enter words that will appear as the label for the field. Maximum of 100 characters.
- **Sort Order** – If you have more than one custom field for a particular entity, the sort order determines the order the field will appear on the custom fields page for the entity.
- **Mask** – This field is only available if the field type of Text is selected. Mask is optional and provides advanced users with the ability to use a “Mask”, which will limit the values that can be entered in the field. The following mask rules are supported:
  - **0 – Digit** – Accepts any digit between 0 and 9.
  - **9 – Digit or Space** - Accepts any digit between 0 and 9, plus a space.
  - **# - Digit or Space** – Similar to 9 rule, but also allows (+) and (-) signs.
  - **L – Letter** – Restricts input to letters a-z and A-Z. This rule is equivalent to [a-zA-Z] in regular expressions.
  - **? – Letter or Space** – Restricts input to letters a-z and A-Z. This rule is equivalent to [a-zA-Z] in regular expressions.
  - **& - Character** – Accepts any character. The rule is equivalent to IS in regular expressions.
  - **C – Character or Space** – Accepts any character. The rule is equivalent to ‘.’ in regular expressions.
  - **A – Alphanumeric** – Accepts letters and digits only.
  - **‘a’ – Alphanumeric or space** – Accepts letters, digits and space only.
  - **‘.’ – Decimal placeholder**. The decimal separator will be a get from the current culture used by Kendo.
  - **‘,’ – Thousands placeholder** – The display character will be a get from the current culture used by Kendo.
  - **\$ - Currency symbol** - The display character will be a get from the current culture used by Kendo.
- **Validation** – This field is only available for field types of Text. Validation is optional and provides advanced users with the ability to use Regular Expressions to validate values entered in the field. Failure to match the Regular Expression pattern will prevent the field’s value from being updated. This can help to ensure data integrity.
- **Grid Width** – This field is for future development.

When finished, click the Save button at the bottom of the form