



Using Custom Fields

Published on 02/03/2017

What are Custom Fields?

Custom fields enable you to add up to 20 unique fields to your project details. These fields are also available in project-based reports. Custom fields can also be mapped from Job Launch forms to the project creation page. *Note: Contact support to initiate a Job Launch mapping request.*

Custom fields can either be free text fields or a list of dropdown options. In addition, you can make the fields required in order to create the project.

Adding Custom Fields

1. To begin, navigate to **Account > Account Settings > Customize > Custom Fields**.
2. To add a custom field, click on any blank custom field.
3. Click the checkbox next to **'Include in the Project.'**
4. *(Optional)* If you want to make this field a requirement, click the corresponding checkbox.
5. Enter a name for your custom field.
6. *(Optional)* If you want to restrict the field to a dropdown list of values, click the corresponding checkbox and enter the values you would like project creators to choose from.

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Custom Field 1

Include in the Project ☒

Make this field a requirement ☐

Name:

Description:

Restrict this field to a list of values ☒

Value

Marketing

Sales

Product

Add Value

Delete Selected Value

Move:

Save Settings

- When finished, click **Save Settings**.

Editing Custom Fields

- Once you've made changes to your custom fields, be sure to log out of your account and log back in order to see the changes take effect.
- Navigate to the Project Dashboard.
- Click **EDIT** in the **Overview** section of the Project Dashboard.
- Enter a value for your custom field and click **BACK TO PROJECT DASHBOARD** to save.

Make Changes To This Project

CANCEL

Project: Sunflower Product Label

Base project on template:

No templates available

Make New Template

Name the project

Sunflower Product Label

Department

Marketing

Sales

Product

Create a 16oz product label for the new summer line. Be sure to incorporate new branding standards.

Set a project start date

6/19/2017 9:00 AM

Set a due date

7/7/2017 1:00 PM

BACK TO PROJECT DASHBOARD