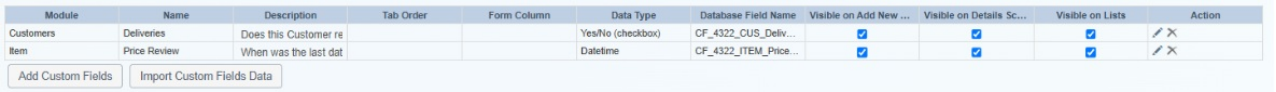
Custom Fields (creating, importing into, etc)

Last Modified on 08/31/2026 9:56 am EDT

Custom Fields

Overview

The **Custom Fields** feature allows you to extend standard 1place screens by adding your **own company-specific fields** without requiring software customization.



Custom Fields are designed to capture **additional information** that is **unique** to your business and is not included in the **standard 1place fields**. Once created, these fields become part of the selected module and can be displayed when **creating records**, **viewing record details**, and on s**ummary list** screens.

This allows your organization to tailor 1place to your operational needs while keeping all important information in a single system.

Some common uses for **Custom Fields** include:

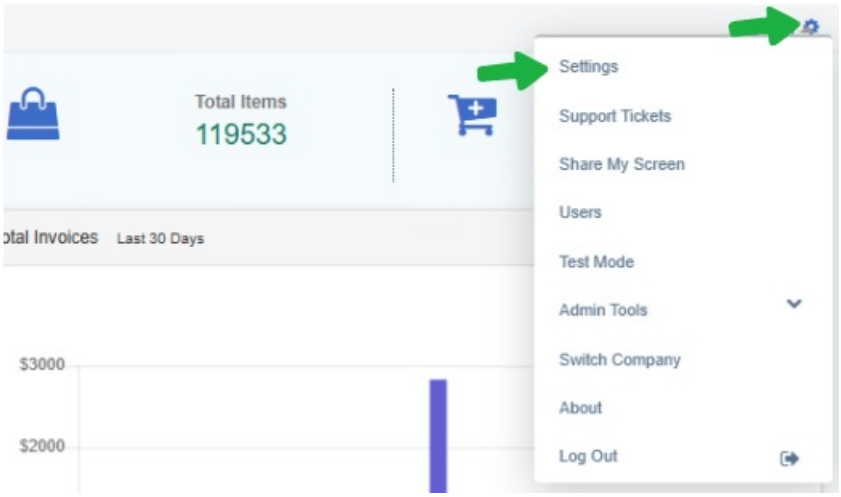
- Insurance Claim Number
- Fleet ID
- Sales Territory
- Internal Reference Number
- Warranty Expiration Date
- Delivery Instructions
- Customer Classification

How to Access the Custom Fields Screen

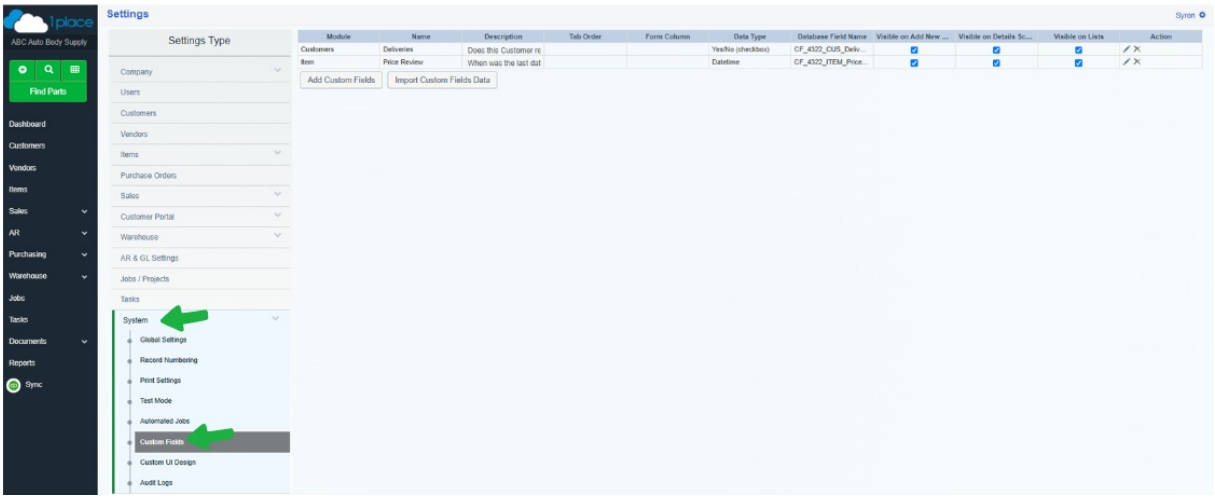
To access the Custom Fields screen:

1. Click the **Settings** (gear icon) located in the upper-right corner of 1place.

2. Select **Settings**.

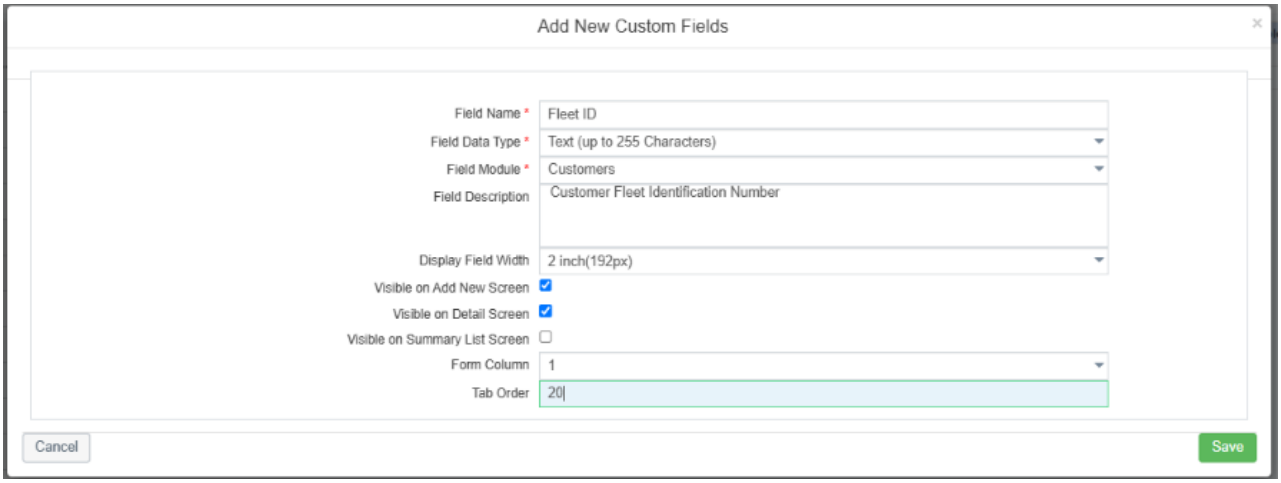


3. Navigate to **System → Custom Fields**.



Understanding the Custom Field Settings

When creating a **Custom Field**, you can configure how the field behaves, where it appears, and what type of information it stores.



Field Name

The **Field Name** is the label displayed to users throughout the selected module.

Choose a clear and descriptive name that identifies the information being collected.

Examples:

- Insurance Claim Number
- Fleet ID
- Sales Territory
- Warranty Expiration
- Internal Reference

Field Data Type

The **Field Data Type** determines what type of information the Custom Field will store.

Data Type	Description	Best Used For
Text (Up to 255 Characters)	Stores short text values.	Reference numbers, names, codes
Text (Up to 50,000 Characters)	Stores large amounts of text.	Notes, instructions, comments
Dropdown List	Allows users to choose from predefined options.	Statuses, departments, categories
Datetime	Stores both the date and time.	Appointment dates, completed time
Date	Stores only a calendar date.	Expiration dates, birthdays, warran
Time	Stores only the time of day.	Delivery time, appointment time
Number (Whole Number)	Stores integers only.	Quantity, Unit Number, Bin Numbe
Number (Decimal)	Stores numbers with decimal values.	Weight, Cost, Measurements
Yes/No (Checkbox)	Stores a True or False value.	Active, Approved, Requires Inspecti

Choose the data type that best matches the information users will enter.

Field Module

The **Field Module** determines which module the Custom Field will be added to.

Module	Description
Customers	Adds the field to Customer records.
Vendors	Adds the field to Vendor records.
Items	Adds the field to Inventory Items.
Quotations	Adds the field to Quote records.
Invoices / Credit Memos	Adds the field to Invoice and Credit Memo transactions.
Sales Orders	Adds the field to Sales Orders.
Purchase Orders	Adds the field to Purchase Orders.
Jobs	Adds the field to Job records.

Once created, the Custom Field will only appear within the selected module.

Field Description

The **Field Description** is optional.

Use this field to provide additional information about the purpose of the Custom Field. This can help administrators understand how the field should be used.

Display Field Width

The **Display Field Width** controls the amount of horizontal space allocated to the field on the screen.

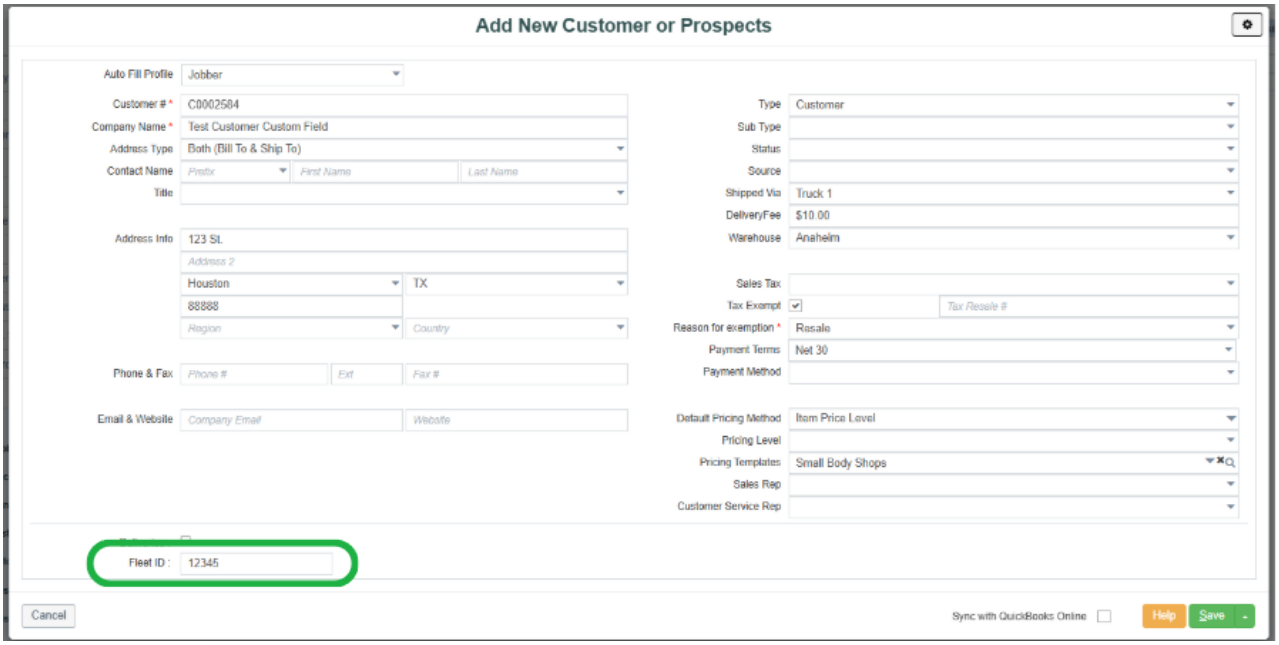
Available widths include:

- 1/4 inch (24 px)
- 1/2 inch (48 px)
- 3/4 inch (72 px)
- 1 inch (96 px)
- 1.5 inches (144 px)
- 2 inches (192 px)
- 2.5 inches (240 px)
- 3 inches (288 px)
- 4 inches (384 px)

Choose a width appropriate for the type of information users will enter. For example, short numeric values typically require less space than long text fields.

Visible on Add New Screen

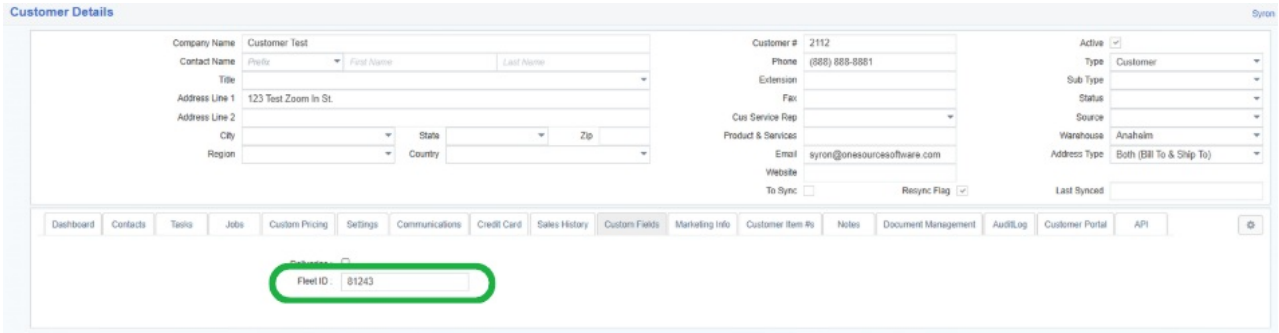
Displays the Custom Field when users create a new record.



Enable this option if users should provide the information during record creation.

Visible on Detail Screen

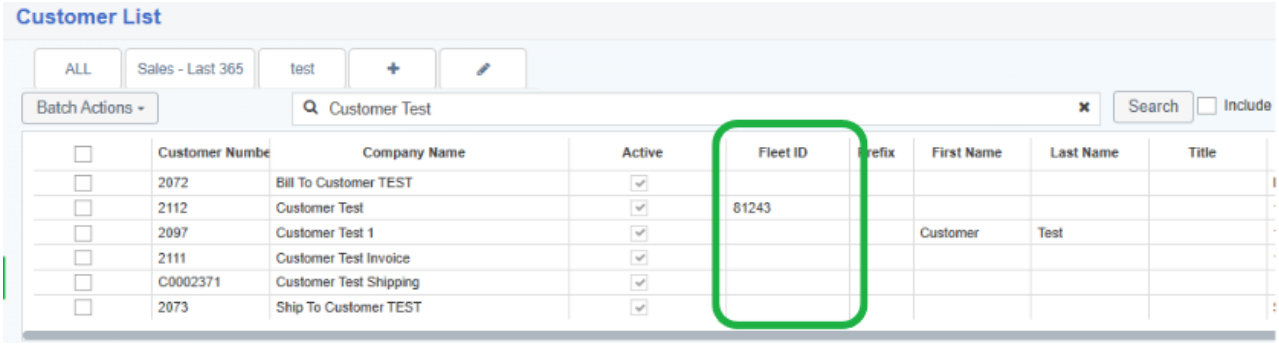
Displays the Custom Field when viewing or editing an existing record.



Enable this option if users should be able to review or update the field after the record has been created.

Visible on Summary List Screen

Displays the Custom Field as a column in the module's summary list.



Enable this option when the information should be visible for searching, reviewing, or comparing records without opening each individual record.

Form Column

Determines which column of the screen layout the Custom Field will appear in.

Available options include:

- **Column 1**
- **Column 2**

This allows administrators to organize Custom Fields into a clean two-column layout for improved readability.

Tab Order

The **Tab Order** controls the order in which users move through fields when pressing the **Tab** key.

Fields with lower tab order values receive focus first, allowing administrators to create a logical and efficient data entry sequence.

How to Add a Custom Field

Follow these steps to create a new Custom Field in 1place.

Step 1. Open the Custom Fields Screen

1. Click the **Settings** (gear icon) located in the upper-right corner of 1place.
2. Select **Settings**.
3. Navigate to **System → Custom Fields**.
4. Click **Add Custom Fields**.

The **Add New Custom Fields** window will appear.

Step 2. Enter the Field Information

Complete the required field information:

- Enter a **Field Name**.
- Select the appropriate **Field Data Type**.
- Select the **Field Module** where the Custom Field will be available.

Optionally, enter a **Field Description** to describe the purpose of the field.

> **Tip:** Refer to the **Understanding the Custom Field Settings** section for guidance on selecting the appropriate Field Data Type and Module.

Step 3. Configure the Display Settings

Configure how the Custom Field will appear within the selected module.

- Select the desired **Display Field Width**.
- Choose whether the field should be visible on:
  - **Add New Screen**
  - **Detail Screen**
  - **Summary List Screen**
- Select the **Form Column** where the field should appear.
- Specify the **Tab Order** to determine the field's position when users navigate using the **Tab** key.

> **Tip:** Display settings allow you to control both the appearance of the field and the user experience during data entry.

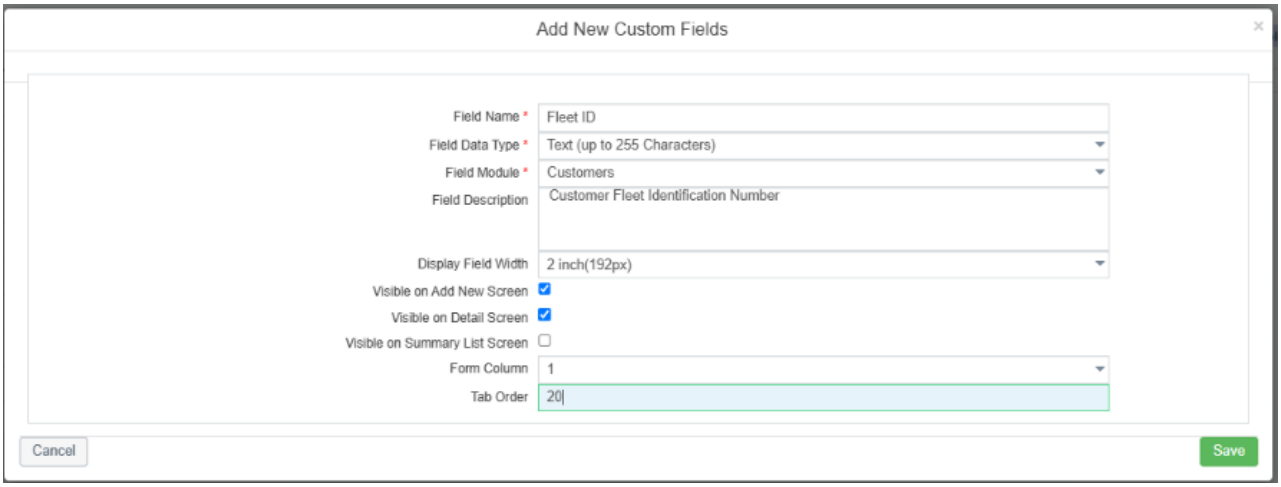
Step 4. Save the Custom Field

After reviewing your settings, click **Save**.

The Custom Field is immediately added to the selected module and will appear according to the visibility and layout options you selected.

Example

The example below creates a Custom Field to store a customer's Fleet ID.



After saving, the **Fleet ID** Custom Field will be available on Customer records, allowing users to store and maintain each customer's fleet identification number.

Best Practices

- Use clear and descriptive field names that users can easily understand.
- Choose the appropriate data type to help ensure accurate and consistent data entry.
- Use **Dropdown Lists** whenever users should select from predefined values instead of entering free text.
- Only display Custom Fields on the screens where they are needed to keep forms clean and organized.
- Select a display width that matches the amount of information expected.
- Arrange the **Tab Order** logically to improve data entry efficiency.
- Periodically review your Custom Fields and remove or update fields that are no longer required to keep your system organized.