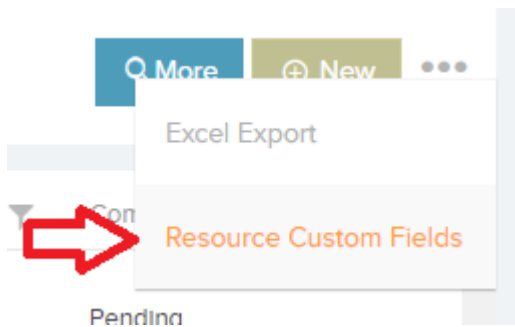


Resource Custom Fields

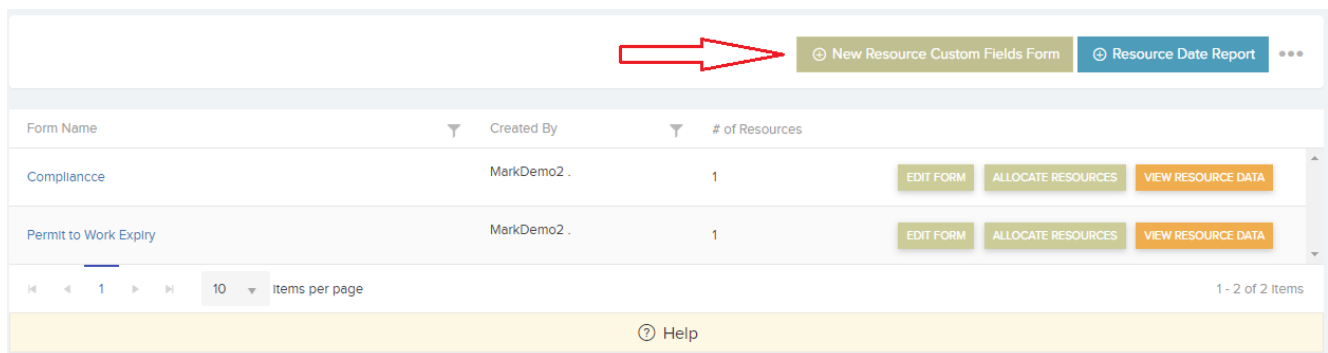
Resource Custom Fields can be very useful to capture additional information about that Resource.

Example: **Insurance Expiry Date.**

Step 1. In the Main Resource List click the triple dots in the top right of the screen and then click **Resource Custom Fields**



Step 2. This will bring you to the **Resource Forms – Custom Fields** area where you can click on **New Resource Custom Fields Form** to create a new form.



Step 3.

Give your form a name, Example – ‘Insurance Expiry date’

Set up the Form notifications and click Save.

Send Email On Expiry – This will send an email when any of the selected date fields expire.

Send Email Days Before Expiry – Enter the amount of days before the expiry of the selected date field that you want to be notified of its upcoming expiry.

Send Email Days After Expiry – Enter the amount of days after the form field has expired that you want to be reminded of its expiry.

The screenshot displays a form configuration interface with two main sections. The first section, titled "Form Header", contains a "Form Name" field with the text "Insurance Expiry date" and a yellow "Help" button with a question mark icon. The second section, titled "Form Notifications on Form Submit", includes a "Send Email On Expiry" toggle set to "Yes", and two input fields for "Send Email Days Before Expiry" (value: 5) and "Send Email Days After Expiry" (value: 1). Below these is an "Email Recipients" field containing the email address "john@facilitiesteam.com", which is underlined in red. At the bottom of this section are two buttons: "Select User" and "Select Resource".

Form Header

Form Name: Insurance Expiry date

[? Help](#)

Form Notifications on Form Submit

Send Email On Expiry: ☒ Yes ☐ No

Send Email Days Before Expiry: 5



Send Email Days After Expiry: 1

Email Recipients: john@facilitiesteam.com

Select User Select Resource

Step 4. Add a form Question.

1. Click Add field
2. Field name will be "Insurance Expiry Date"
3. Type will be Date
4. Is Required – Yes
5. Section – Main

Resource Custom Fields									
Field Name	Type	Is Require...	Order	Expiry Reminder	Default	Section	Tag		
Insurance Expiry Date	Date	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	n/a	Main			

Step 5. On the Resource Details Edit page, in the bottom right corner select 'Insurance Expiry date' from the dropdown and Save.

Resource Custom Fields Form

Insurance Expiry date ▼

You can capture additional information about this resource in addition to the fields here, if you have set up a Resource Form in the Resource Custom Fields area. Select the Resource Custom Fields Form in the dropdown above. Then once this field is saved, you can click on the Custom field tab and complete the additional information.

Step 6.

- Back on the Resource Details page click the tab 'Custom Fields'
- Edit the page and enter the expiry date of that Resources Insurance.
- Click Back

Darren
Resource Name

Resource Address

Available
Availability Status

Approved
Compliance Status

Details Regions & Trades Portal & App Documents Qualifications (3) Availability Contacts Forms (3) Billing Stock Custom Fields

Main Resources List Edit

Main
Insurance Expiry Date
30-11-2021

