## **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.

				>	⊗ New Resource Custom Fields Form ③ Resource Date Report
Form Name	Ŧ	Created By	т	# of Resources	S
Compliancce		MarkDemo2 .		1	EDIT FORM ALLOCATE RESOURCES VIEW RESOURCE DATA
Permit to Work Explry		MarkDemo2 .		1	EDIT FORM ALLOCATE RESOURCES VIEW RESOURCE DATA
I I ► ► 10 ▼ Items per page					1 - 2 of 2 items
			? Hel	р	

## 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.

Form Header									
Form Name	Insurance Expiry date								
⑦ Help									
Form Notifications on Form Submit									
Send Email On Expiry	● Yes ○ No								
Send Email Days Before E	xpiry 5								
Send Email Days After Exp	biry 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										⊕ Add Field ••••	
Field Name	T	Туре	T	ls <b>T</b> Require	Order <b>T</b>	Expiry T Reminder	Default <b>y</b>	Section T	Tag	T	
Insurance Expiry Date		Date			0		n/a	Main		Û	

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



## 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		, Re	• Resource Address				Availabl Availability	l <b>e</b> Status	Approved Compliance Status		
Details	Regions & Trades	Portal & App	Documents	Qualifications (3)	Availability	Contacts	Forms (3)	Billing	Stock	Custom Fields	
									🖘 Ma	ain Resources List	🖉 Edit
Main Insurance E 30-11-202	xpiry Date 21										