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# Custom Fields

## Introduction

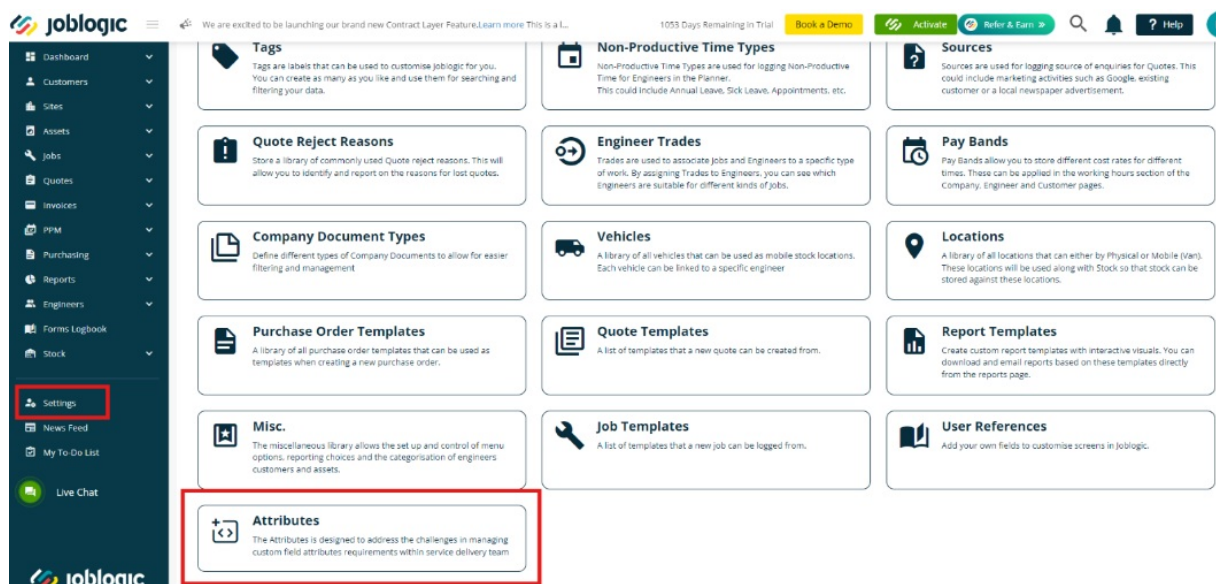
The Custom Fields feature allows you to define and manage custom attributes for various entities such as equipment, customers, sites, jobs, quotes, and PPM contracts.

By adding attributes, you can enhance the detail and customisation of your Joblogic system.

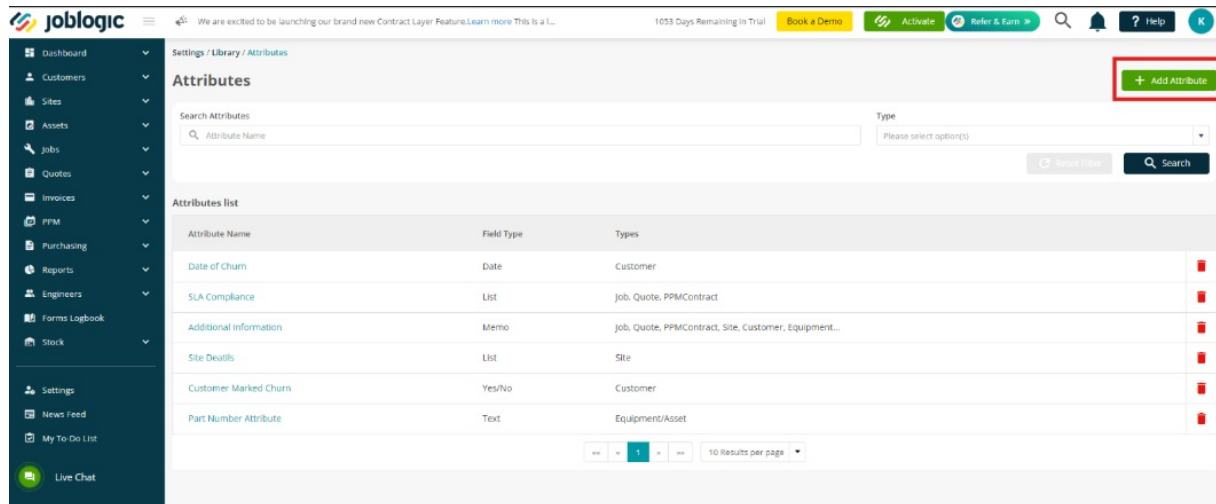
This guide will outline the steps for setting up custom fields in the system and assigning them to different entities. Whether on the web platform or mobile app, these tools streamline data entry and improve operational efficiency.

## Setting up your Attributes

To set up your Attributes, click Settings > Library > Attributes

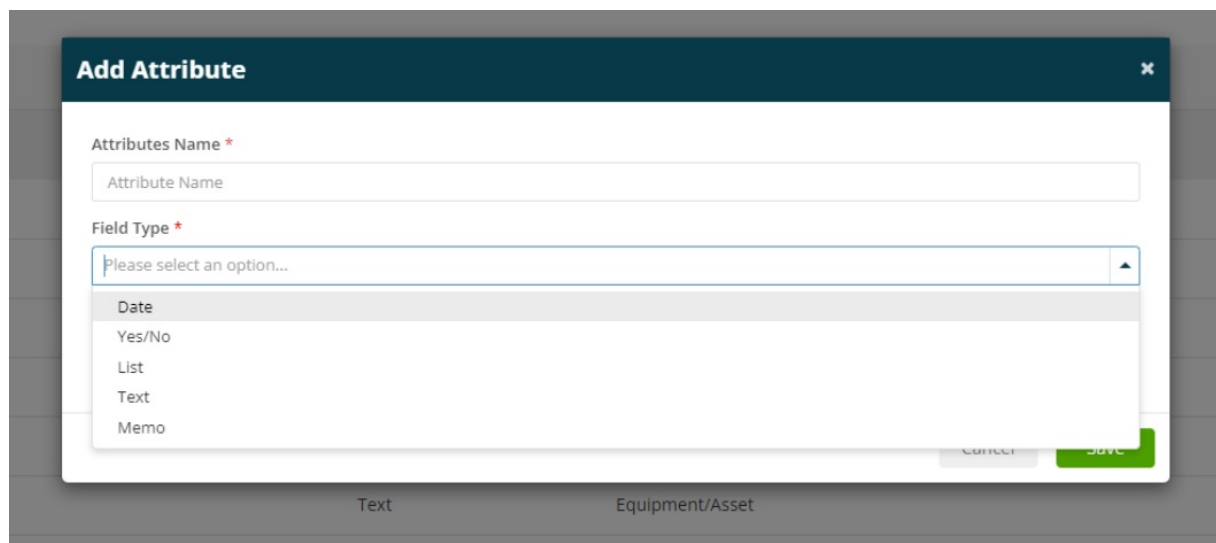


From here, click the Add Attribute button in the top right



Next you can give your Attribute a name. You can then choose the field type from the dropdown.

- **Date:** A field that allows you to select a specific date from a date picker
- **Yes/No:** A simple field for Yes/No choices
- **List:** A dropdown field that presents your predefined options
- **Text:** A field for short, single-line inputs
- **Memo:** A larger, multi-line field for longer text entries



Finally, you can choose the Type (i.e. Customer, Quote, etc).

You can tick more than one type to assign the attribute to multiple entities.

**Add Attribute**

Attributes Name \*

Attribute Name

Field Type \*

Please select an option...

Type \*

Customer x Site x

☐ Equipment/Assets

☒ Customer

☒ Site

☐ Jobs

☐ Quotes

☐ PPM Contract

Click Save when you are happy with your selections.

## Assigning Attributes

Attributes can be assigned to Customers, Sites, Jobs, Quotes, PPM Contracts and Assets/Equipment.

For this example, we'll walk through assigning an attribute to a Job.

Firstly, click Jobs > All Jobs and then select the Job Number.

**Jobs**

Search Jobs

Customer / Site / Job Number / Contact / Description / Order No. / Reference / Priority Description / External Project Num

Date Logged: 01/04/2024

Status: Please select option(s)

Appointment Date: Start Date, End Date

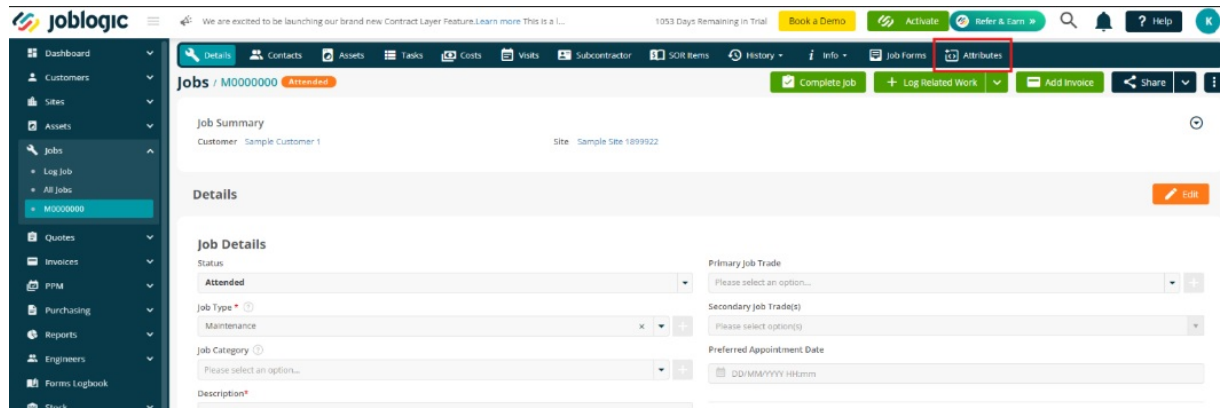
Show Advanced

Filters are applied

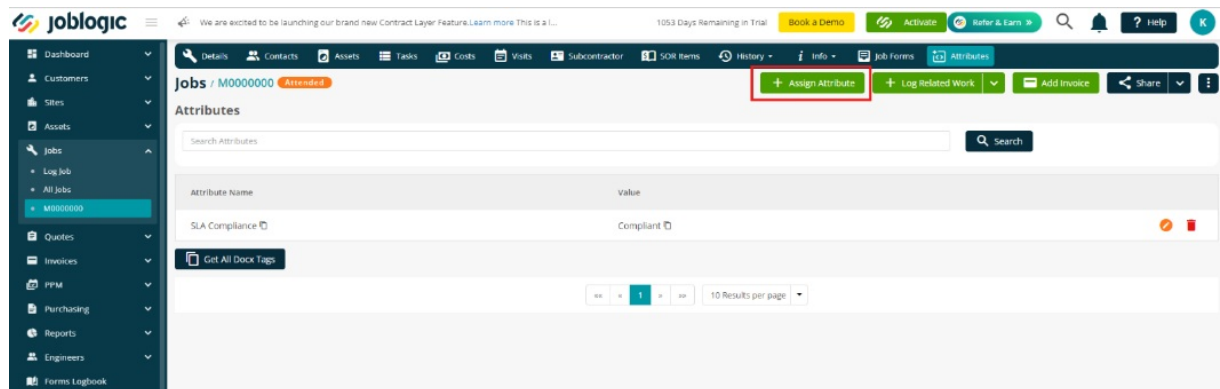
Job No.	Customer Name	Site Name	Status	Visits	Priority	Remaining	Job Category	Customer Order Number	Date Logged	Date Comp
M0000000	Sample Customer 1	Sample Site 1899922	Attended	2	High	0d 0h 0m			27/08/2024 04:10	
M0000003	Sample Customer 1	Sample Site 1899922	New Job	0	High	0d 0h 0m			12/09/2024 03:12	
M0000004	Sample Customer 1	Sample Site 1899922	New Job	0	High	0d 0h 0m			26/09/2024 07:28	
M0000005	Sample Customer 1	Sample Site 1899922	New Job	0	High	0d 0h 0m			26/09/2024 10:35	
M0000006	Sample Customer 1	Sample Site 1899922	Attended	1	High	0d 0h 0m			26/09/2024 10:35	
M0000001	Sample Customer 2	Sample Site 2	New Job	0	High	0d 0h 0m			27/08/2024 04:10	
M0000002	Sample Customer 3	Sample Site 3	New Job	0	High	0d 0h 0m			27/08/2024 04:10	

10 Results per page

Next, click the Attributes tab at the top of the page



## Click Assign Attribute



Choose your Attribute from the dropdown. Only attributes that were assigned to Jobs will be visible in this dropdown.

The field type will then be auto populated based on the type you entered in your setup.

The screenshot shows a modal window titled "Add Attribute" with a close button (X) in the top right corner. The form contains three main sections: "Attribute Name\*", "Field Type\*", and "Value\*". The "Attribute Name\*" section has a text input field containing "Additional Information", a clear button (X), a dropdown arrow, and a green "+" button. The "Field Type\*" section has a dropdown menu with "Memo" selected. The "Value\*" section is a large empty text area. At the bottom right are "Cancel" and "Save" buttons. A red rectangle highlights the "Attribute Name\*" and "Field Type\*" sections.

You'll finally be able to enter your value for this field, against this job.

This screenshot shows the same "Add Attribute" modal window. In this view, the "Value\*" section, which is a large empty text area, is highlighted with a red rectangle. The other elements, including the "Attribute Name\*" and "Field Type\*" sections and the bottom buttons, remain the same as in the previous image.

Click Save to finalise the attribute.

Assigning an attribute to Assets/Equipment is slightly different. While Customer, Site, Job, Quote and PPM Contracts have an extra tab for Attributes, the Asset/Equipment screens include the attributes on the main details' pages.

## Assets

- Assets > All Assets > choose your asset > Edit

## Equipment

- Settings > Library > Equipment > choose your Equipment > Edit

## Click Add Attribute

The screenshot shows the Joblogic 'Assets' edit screen. The left sidebar contains navigation links: Dashboard, Customers, Sites, Assets, Jobs, Quotes, Invoices, PPM, Purchasing, Reports, Engineers, Forms Logbook, and Stock. The main content area is divided into two columns. The left column contains form fields for 'Quantity', 'Price Per Unit', 'Sell Per Unit', 'Tax Rate', 'Current Rate', 'Tags', 'Equipment Class', and 'Service Type'. The right column contains sections for 'Attachments', 'Linked Supplier', and 'Attributes'. The 'Attributes' section is highlighted with a red box, showing a '+ Add Attribute' button and a table with columns for 'Attribute Name' and 'Value'. The table currently has one entry with 'test' in the Value column.

Choose your Attribute Name from the dropdown or click the green + button to add a new attribute to your Library.

Only attributes that were assigned to the relevant entity will be visible in this dropdown.

The field type will then be auto populated based on the type you entered in your setup.

**Add Attribute** ×

Attribute Name\*  
Part Number Attribute × ▼ +

Field Type \*  
Text

Value \*

Cancel Save

Enter your value for this field and click Save.

**Add Attribute** ×

Attribute Name\*  
Part Number Attribute × ▼ +

Field Type \*  
Text

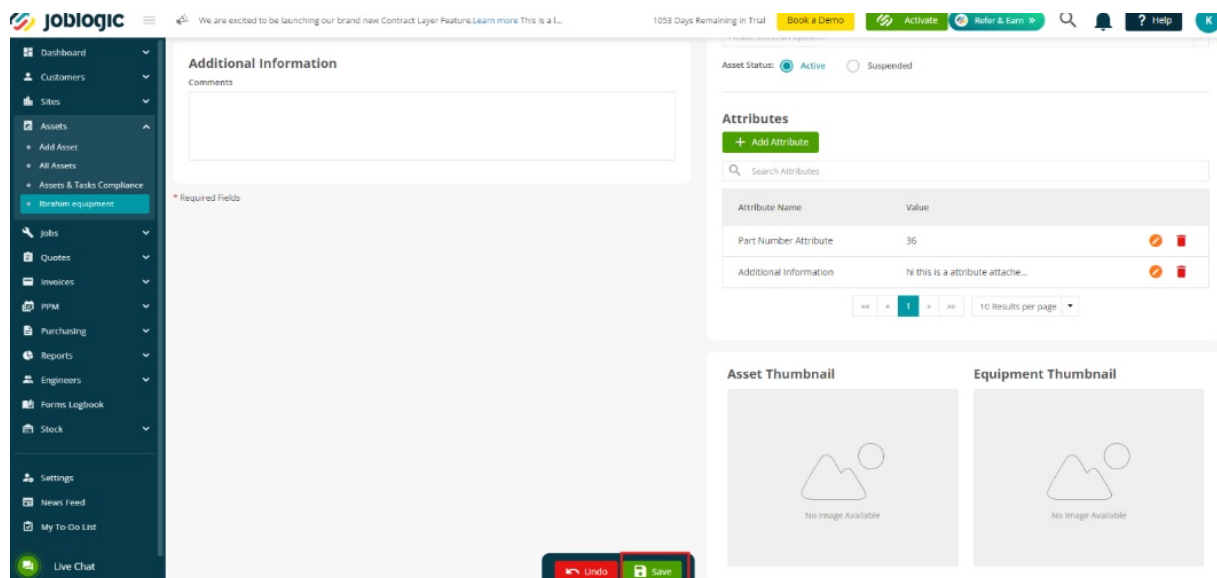
Value \*

Cancel

Save

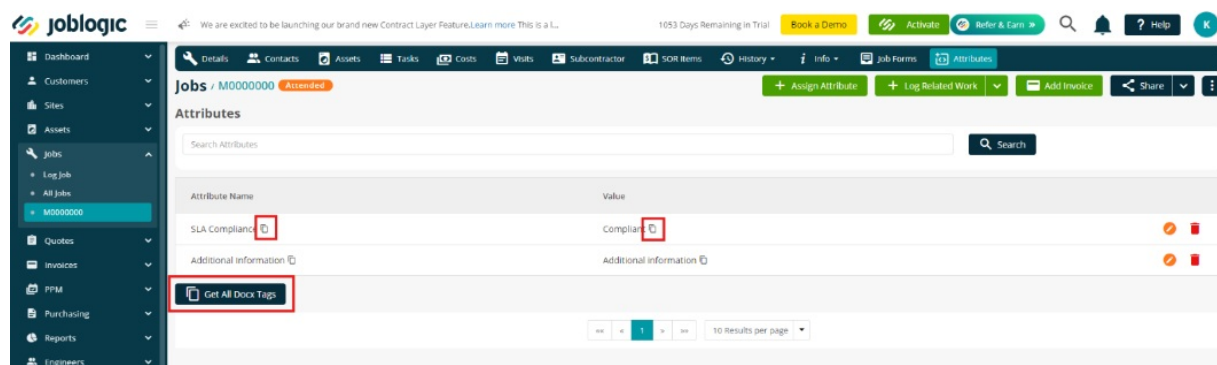
Finally, remember to save the Asset/Equipment to finalise your changes.



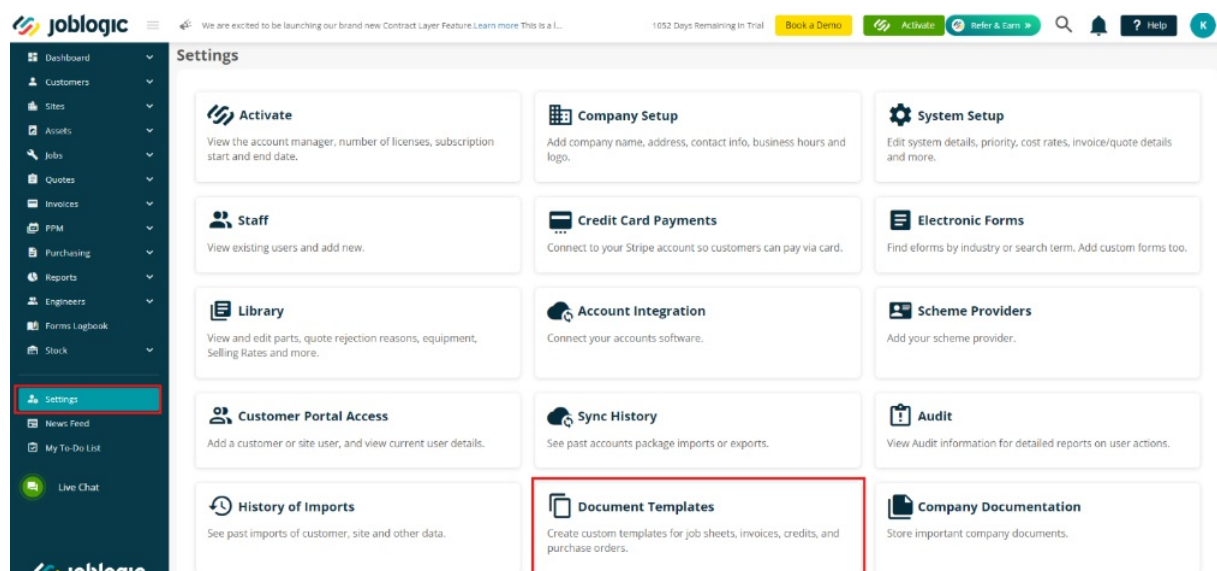


## Document Template tags

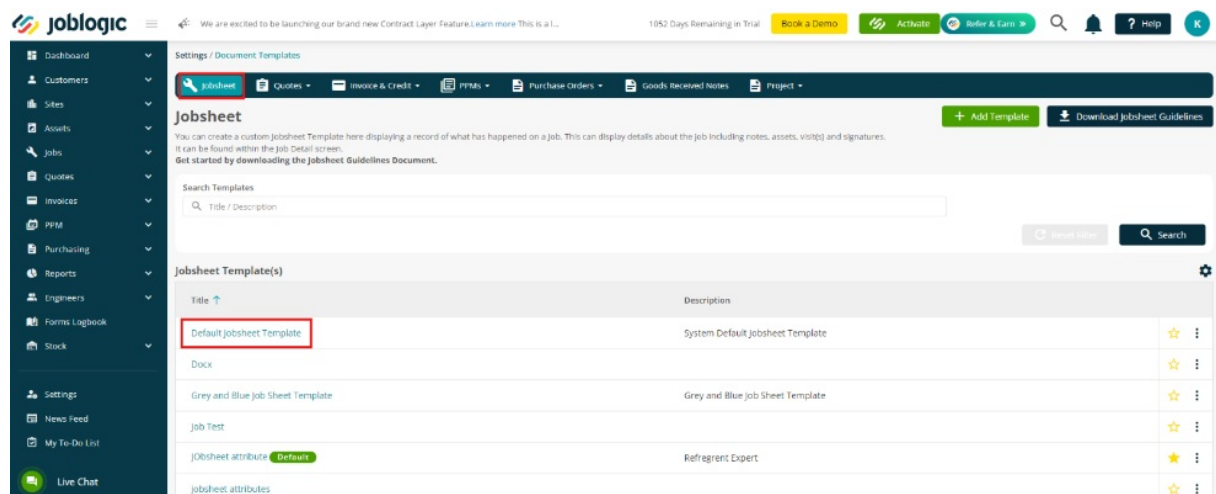
When you've added attributes to Jobs, Quotes or PPM Contracts, you'll see a 'Get all Docx Tags' button and copy icons next to each of your tags. Click this to copy the information.



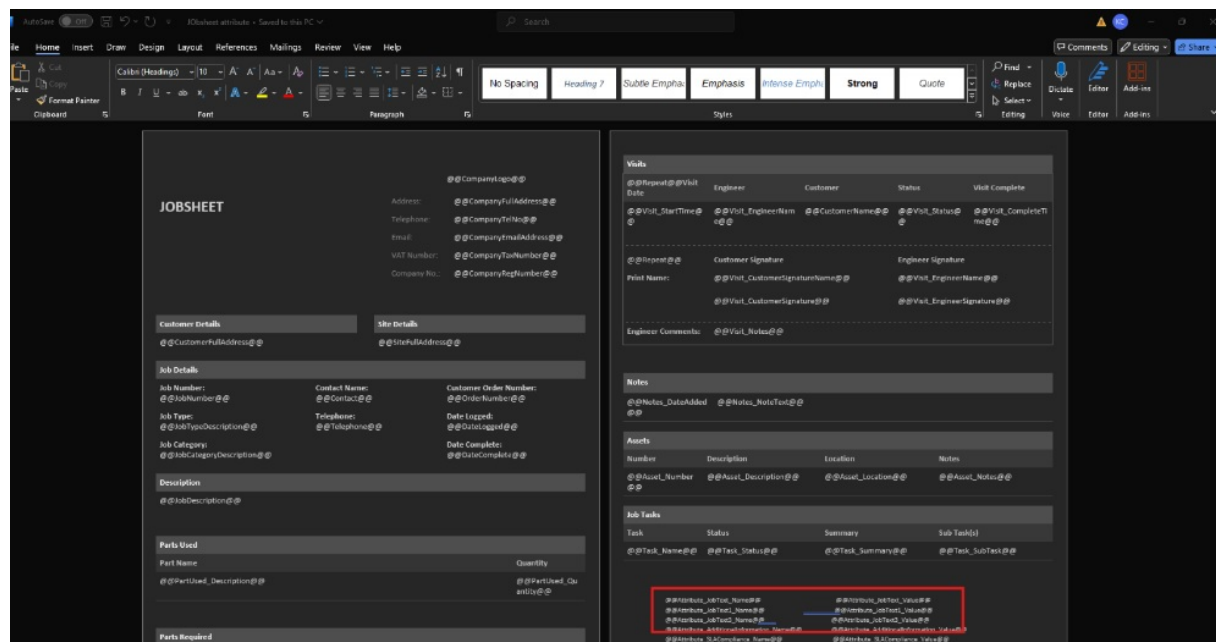
If you want to add these Attribute details to the relevant document, i.e. Job sheet, Quote or PPM template, you can navigate to Settings > Document Templates.



Next, find your template and click the Title to download it.



Once you have opened the file, you can start making changes, including pasting the tags you have just copied.



For more information on setting up your document templates, click [here](#).

## Further Support

For further information or assistance with the above, contact our Support Team on 0800 326 5561 or email [support@joblogic.com](mailto:support@joblogic.com). Alternatively, our Customer Success Management team can be reached by emailing [customersuccess@joblogic.com](mailto:customersuccess@joblogic.com)

## Publishing Details

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