

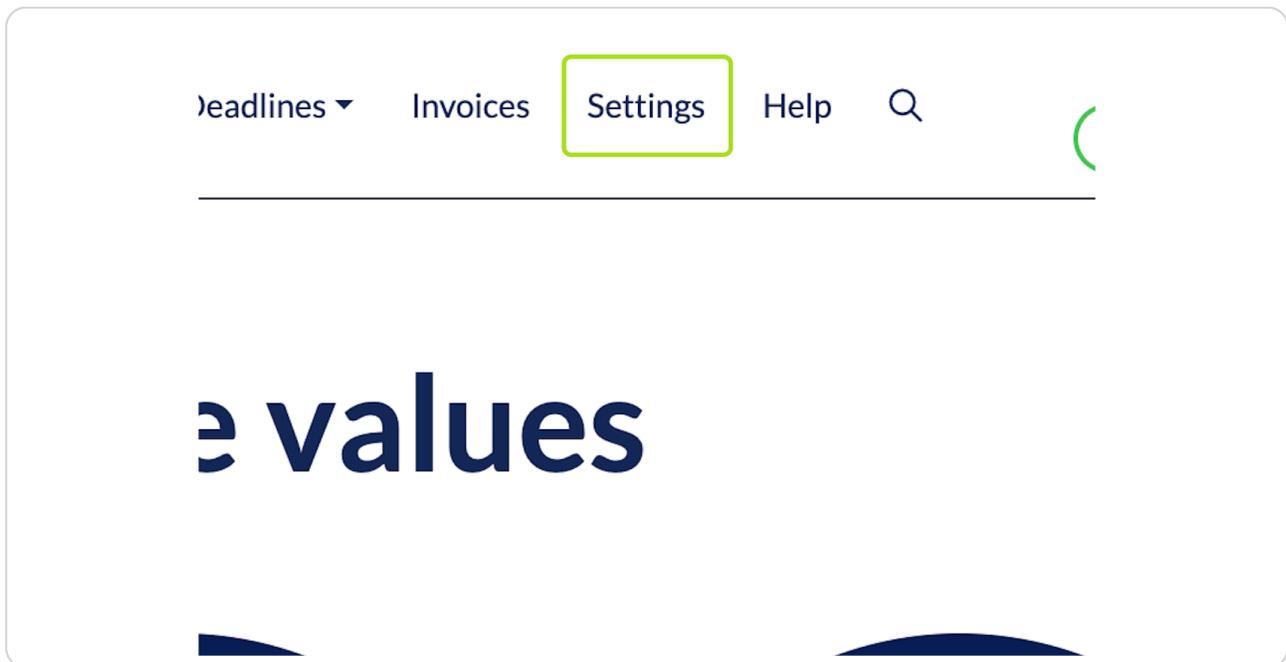
Create Custom Fields

10 Steps [View most recent version on Tango.us](#) 

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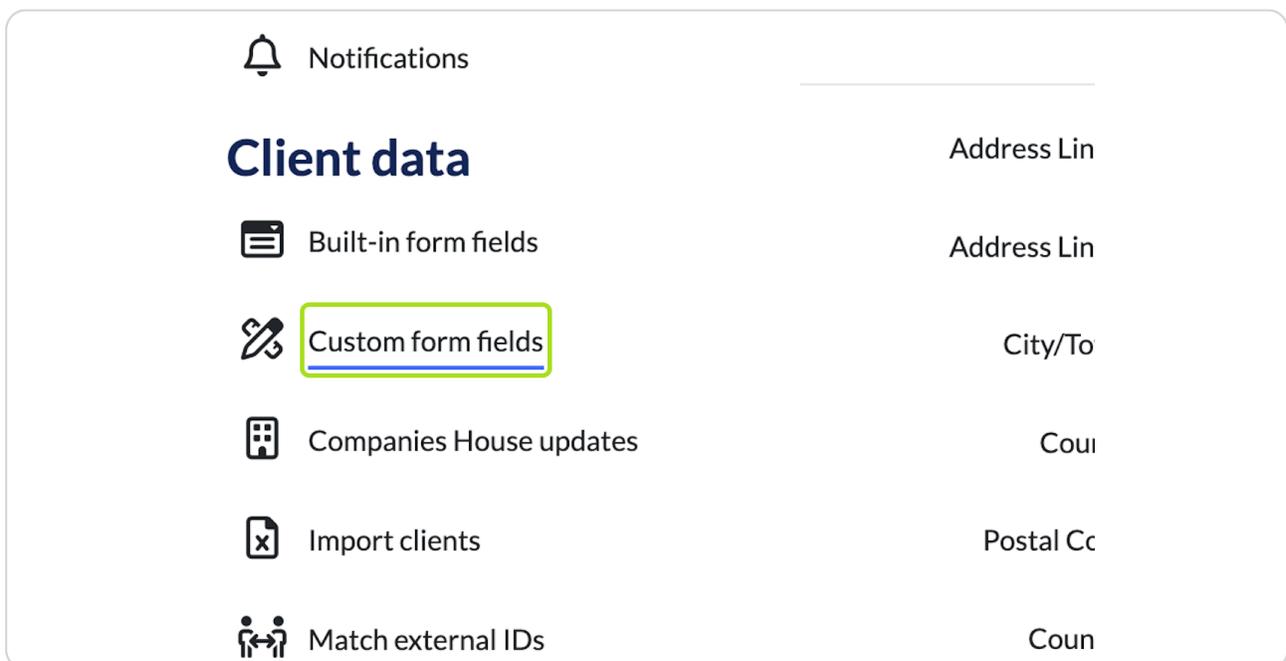
STEP 1

Click on Settings



STEP 2

Click on Custom form fields



STEP 3

Click on new section

Name	Hint	summary	placeholder	Data type
Statement] Do you require a confirmation Statement	-	✗no	✓yes	Dropdown choice

+ new field

+ new section

STEP 4

File our details of the new section and from the drop down menu select where the field appears

The screenshot shows the 'Add section' modal in the Client Engager interface. The modal contains the following fields:

- Header:
- Description:
- Client form step:

At the bottom of the modal are 'Save' and 'Cancel' buttons. The background shows a table with the following data:

Placeholder symbol	Name	Show In	Hint	summary	placeholder	Data type	Default value	Actions
[[[Custom:HowWillTheClientCommunicateWithUs]	How will the client	-	✗no	✗no		Single-line text (up to 255		edit move to section delete

Below the table are '+ new field' and '+ new section' buttons.

STEP 5

Click on new field

Name	Hint	Show in summary	Pricing Factors placeholder	Data type
Client] Do you require a confirmation Statement	-	✗ no	✓ yes	Drop-down choice

+ new field

+ new section

STEP 6

Add Name of field

Dashboard Clients Emails 2 Deadlines Invoices Settings Help

Principal Admin

Name:

Placeholder: [Custom:]

Hint:

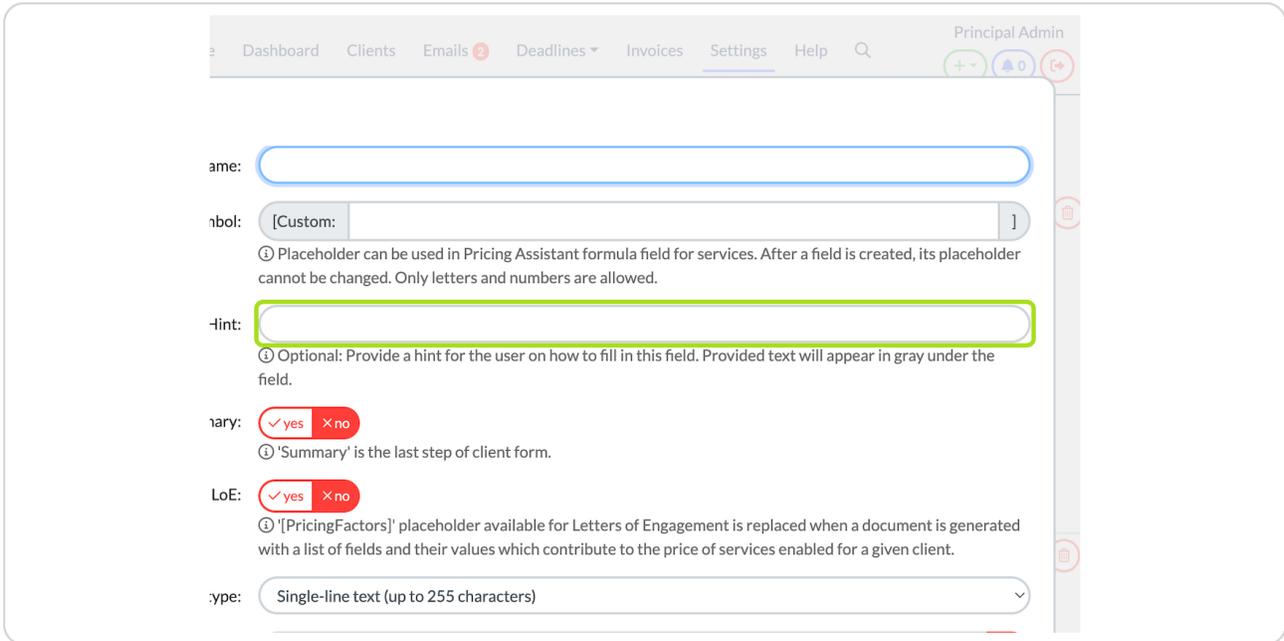
Summary: yes no

LoE: yes no

Type: Single-line text (up to 255 characters)

STEP 7

Provide a hint for the user on how to fill in this field. Provided text will appear in gray under the field.

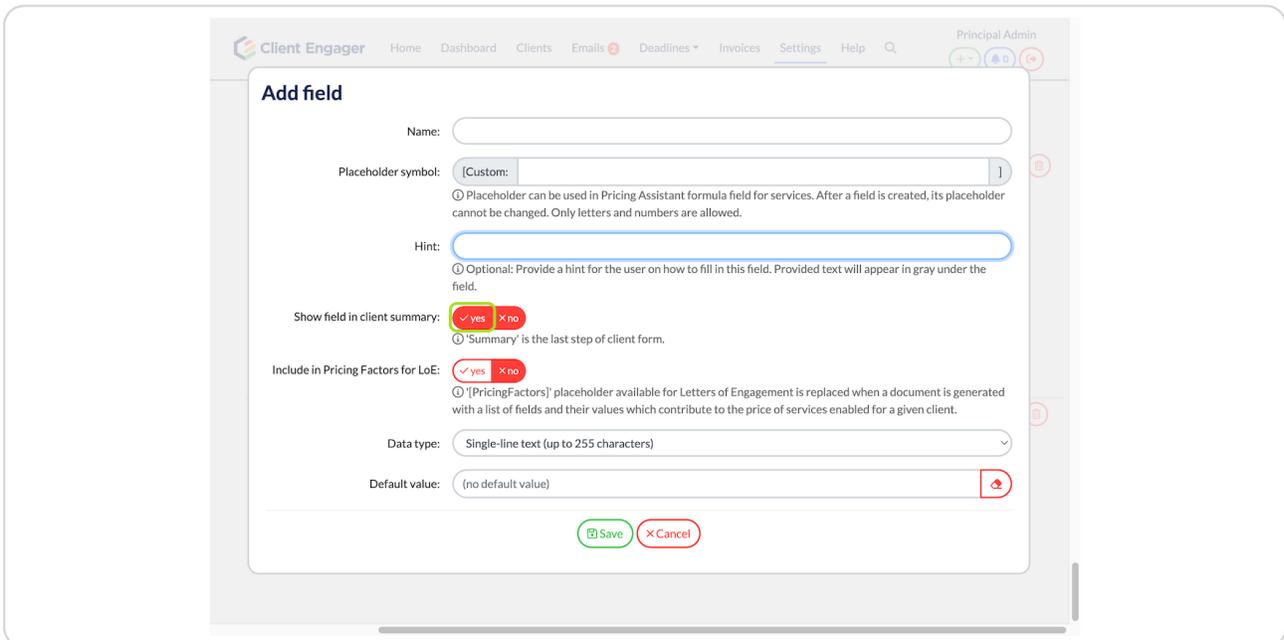


The screenshot shows the 'Add field' form in the Client Engager application. The form includes the following fields and options:

- Name:** An empty text input field.
- Placeholder symbol:** A dropdown menu with '[Custom:]' selected. Below it is a note: "Placeholder can be used in Pricing Assistant formula field for services. After a field is created, its placeholder cannot be changed. Only letters and numbers are allowed."
- Hint:** An empty text input field, highlighted with a green border. Below it is a note: "Optional: Provide a hint for the user on how to fill in this field. Provided text will appear in gray under the field."
- Summary:** Radio buttons for 'yes' (selected) and 'no'.
- LoE:** Radio buttons for 'yes' (selected) and 'no'.
- Data type:** A dropdown menu with 'Single-line text (up to 255 characters)' selected.

STEP 8

Select if you want the field information to be in client summary



The screenshot shows the 'Add field' form in the Client Engager application. The form includes the following fields and options:

- Name:** An empty text input field.
- Placeholder symbol:** A dropdown menu with '[Custom:]' selected. Below it is a note: "Placeholder can be used in Pricing Assistant formula field for services. After a field is created, its placeholder cannot be changed. Only letters and numbers are allowed."
- Hint:** An empty text input field. Below it is a note: "Optional: Provide a hint for the user on how to fill in this field. Provided text will appear in gray under the field."
- Show field in client summary:** Radio buttons for 'yes' (selected) and 'no'.
- Include in Pricing Factors for LoE:** Radio buttons for 'yes' (selected) and 'no'.
- Data type:** A dropdown menu with 'Single-line text (up to 255 characters)' selected.
- Default value:** A text input field with '(no default value)' and a red 'X' icon.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

STEP 9

Select if you want the field to appear in the pricing factors section in documents

Optional: Provide a hint for the user on how to fill in this field. Provided text will appear in gray under the field.

Appear in client summary: yes no

'Summary' is the last step of client form.

Appear in Pricing Factors for LoE: yes no

'[PricingFactors]' placeholder available for Letters of Engagement is replaced when a document is generated with a list of fields and their values which contribute to the price of services enabled for a given client.

Data type:

STEP 10

Select field type then press save

Hint:

Optional: Provide a hint for the user on how to fill in this field. Provided text will appear in gray under the field.

Appear in client summary: yes no

'Summary' is the last step of client form.

Appear in Pricing Factors for LoE: yes no

'[PricingFactors]' placeholder available for Letters of Engagement is replaced when a document is generated with a list of fields and their values which contribute to the price of services enabled for a given client.

Data type:

Default value: (no default value)

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