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## Creating Custom Fields

If you can't find what you need, you can always add custom fields to the program, so you can develop your own custom reports. To do this, follow the steps below:

1. From the main menu, click on Organization Information/Standards.
2. Enter your name and click I Understand.
3. Click on the Custom Fields tab at the top of the screen.
4. In the first column Custom Field Name – Example: Day Care Voucher or Weekly Fee.
5. In the second column Form Caption – the same as the Field Name. This is the caption/column name that appears in the Members section, Custom tab.
6. In the third column Report Caption – the same as the Field Name. This is the caption/column name that appears at the top of your report column.
7. In the fourth column Data Type – choose between text, currency, decimal points, etc. Options are available through a pull-down menu, once you click inside the column.
8. In the Width column, make this wide enough to handle any data and/or the Report Caption.
9. In the Justify column, choose normal, left, right or center. This will determine how your answers are displayed in the column. These options are available through a pull-down menu, once you click inside the column.
10. In the Used By column – Select whether to use this is a custom field for members data, staff data or both from the dropdown menu.
11. In the Active column click the Active checkbox if this is a field you are going to use. Old fields can be set inactive later if needed.
12. In the Required column, click this if you want the field to be required when adding in new applications.
13. In the Show column, click this if you want it to show on the Add Member or Add Staff forms.
14. Follow steps 3 through 13 for each customized field that follows. Other examples might include Food Stamps, General Assistance, Can Take Surveys, Can Swim, Weekly Fees, Monthly Fees, etc.
15. When you close out of Organization Information, the system will verify those new fields for each member. This may take a minute or two to complete, depending on file size.
16. Fill in the answers:
    a. From the Main Menu, click on Members. Search for each member, click on the Custom tab and fill in the data in the "Answer" column.
    b. From Procedures, Member-Specific Tools tab, Find and Fix Missing Member Data. On the Universal Selection Engine choose who you want to fill information for and click Continue. In the Data Group dropdown choose Custom Fields, choose the specific Custom Field that you want to fill in the answers for and fill in the answers.
17. Once your data has been entered for each member, you can build custom reports.
    See Quick Tip: Reports-Custom Member List