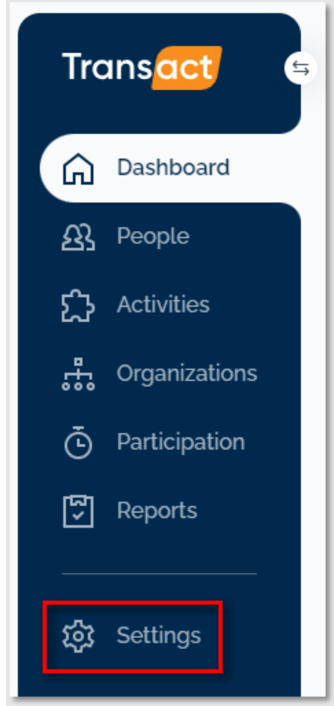
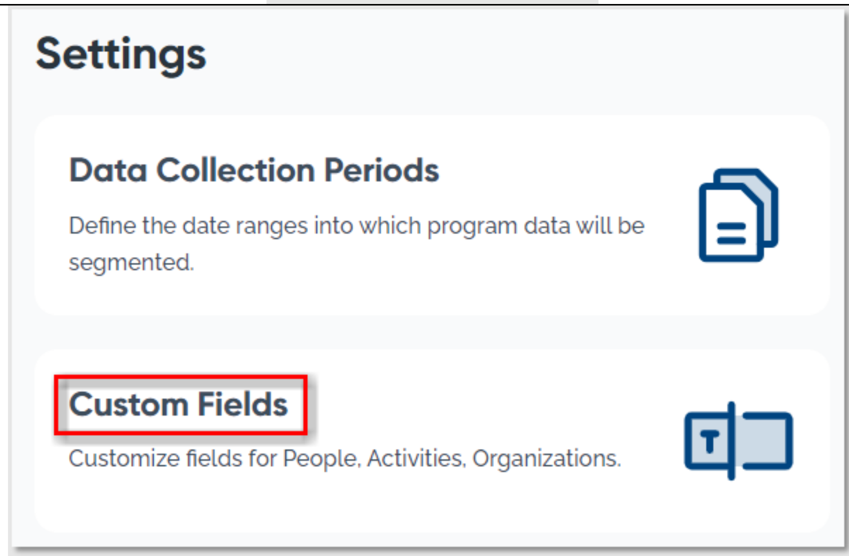
Managing Custom Fields

<table>
<tr><td colspan="2">While SST tracks considerable data about the people you serve, the services you offer, and the organizations you work with, you can create additional data fields unique to your initiatives to support students experiencing homelessness.</td></tr>
<tr><td>Select the “Settings” tab in your lefthand navigation menu to create a custom field.</td><td>
</td></tr>
<tr><td>Select “Custom Fields” on the settings page.</td><td>
</td></tr>
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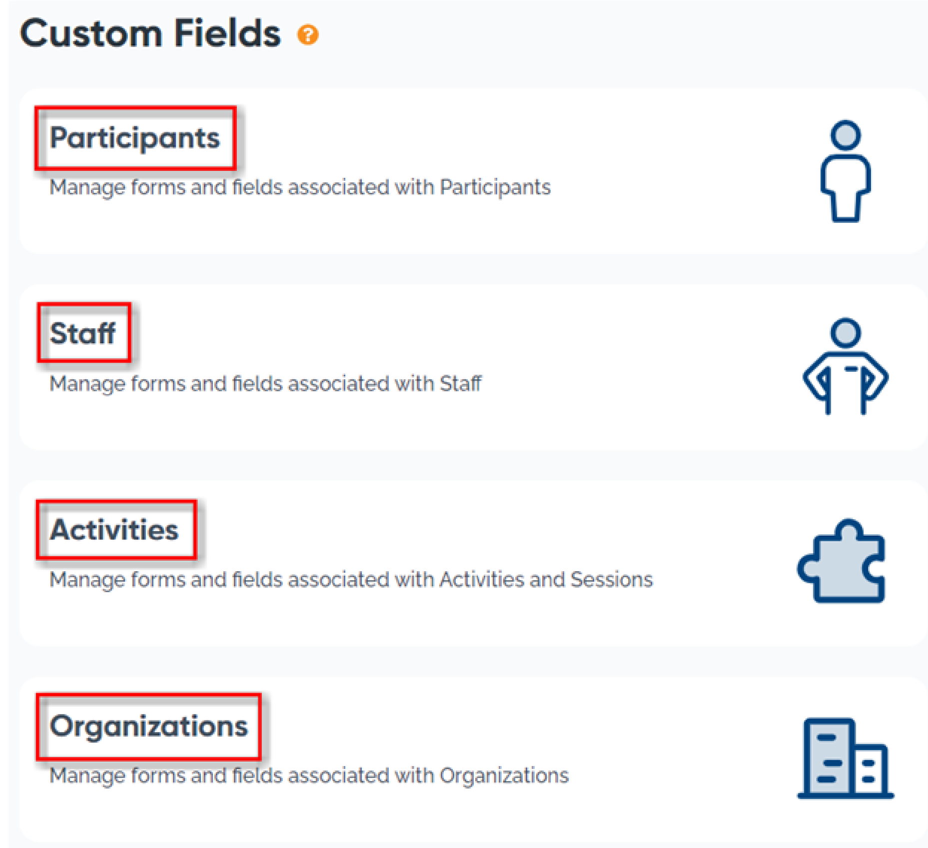
<table>
<tr>
<td>
You can create custom fields for People, Staff, Activities, or Organizations.

Click on the category for which you'd like to create a custom field.
</td>
<td>


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<td>
Custom Field Library
Custom fields may already exist but for a different section.

Use the "Custom Fields Library" link at the bottom of the form to view fields already created.

If the field you want to use is here, click the "..." next to the field name and add it to the section. If not, continue with this article to add a new custom field.
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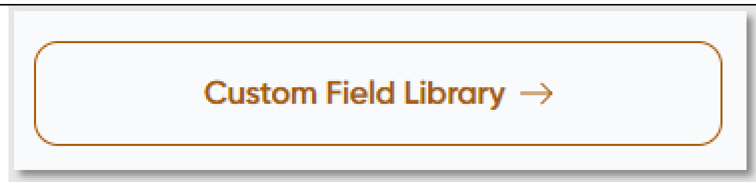
<td>


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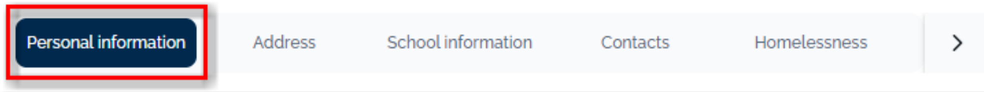
</table>

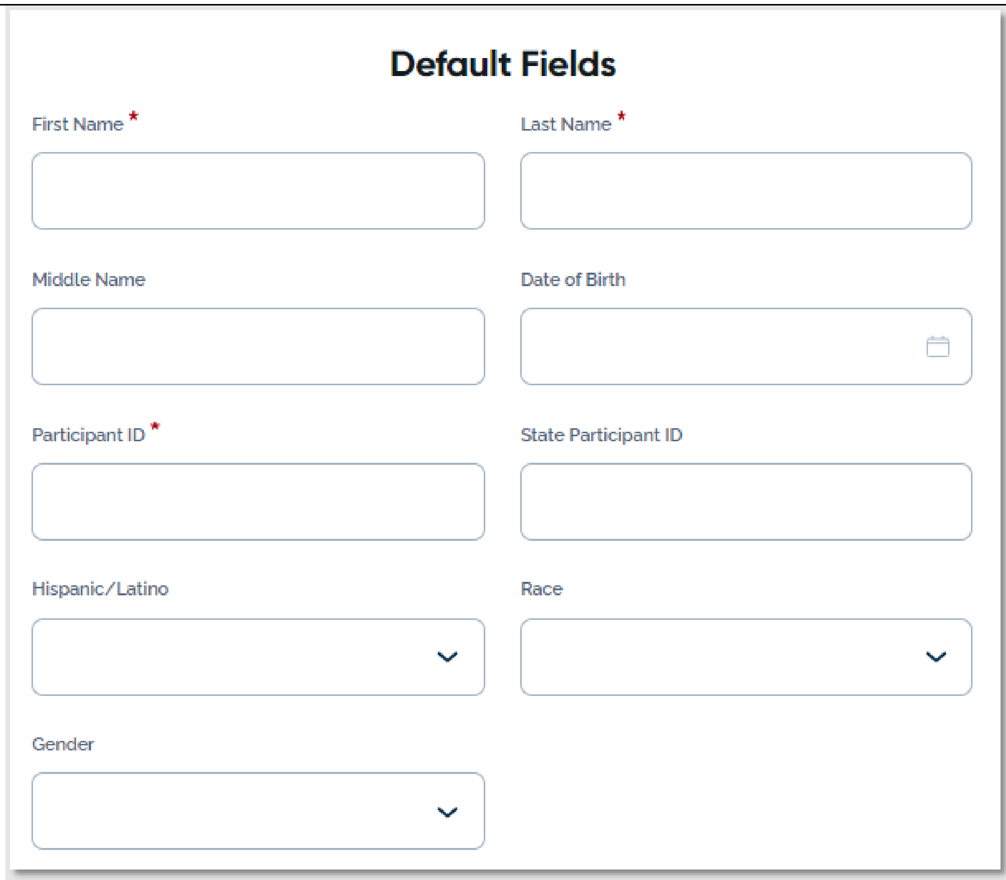
People

When creating custom fields for People, you can select the section of the profile where the custom field will show. There are only four options: Personal Information, Address, School Information, Contacts, and Homelessness.

Click on the section's name to create a custom field for it.



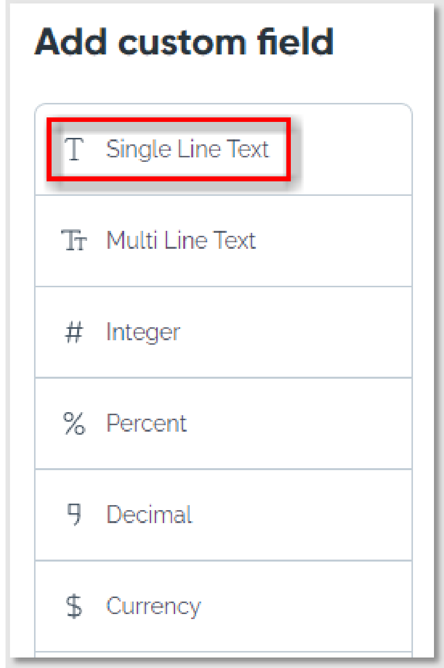
The first section displays the Default Fields under each category. These fields will appear for all participants in this profile category and are not editable.



Custom Fields already in use are displayed in the second section.

To edit an existing custom field, click the gear button to the right of the custom field name.

<table>
<tr>
<td>To create a new custom field, click on the custom fields type to the right.

To learn more about the custom fields available, read this article.</td>
<td>
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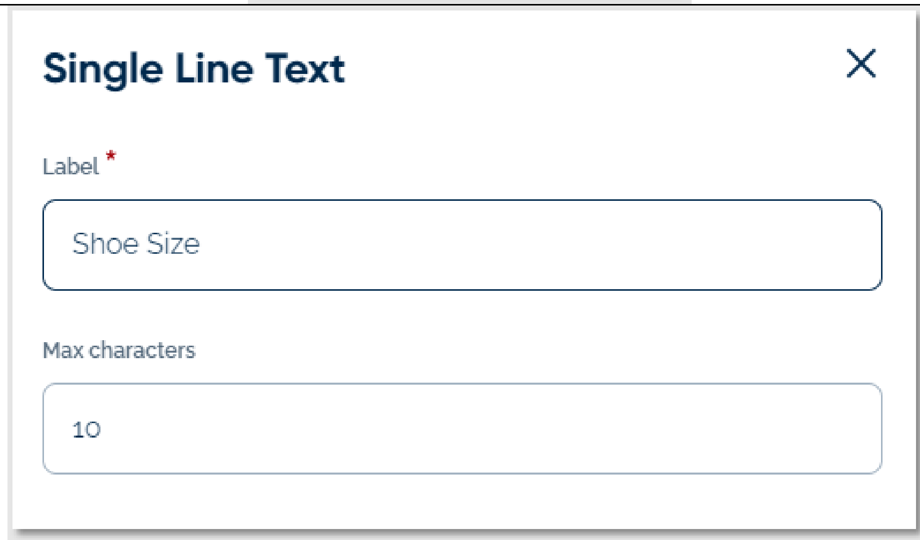
<tr>
<td>Fill out the required information for the custom field type selected.

Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.</td>
<td>
</td>
</tr>
<tr>
<td>For all custom fields, you want to determine if it is required.

You can also limit access to:

Read & Write: Users can edit the value as needed, regardless of role.
User Role Based: Define each of the above permissions by role.

Click "Done" at the bottom of the form to close it.</td>
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<tr>
<td>To complete the process and add the custom field to the Custom Field Library, click "Save changes" at the top of the screen.</td>
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Staff

When creating custom fields for Staff, you can select the section of the staff record where the custom field will show. There are only four options: Personal Information, Employment Information, Address, and Contacts.

Click on the section's name to create a custom field for it.

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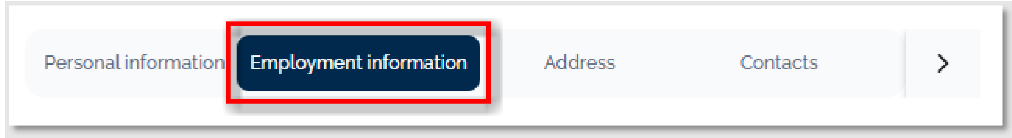

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The first section displays the Default Fields under each category. These fields will appear for all staff in this record category and are not editable.

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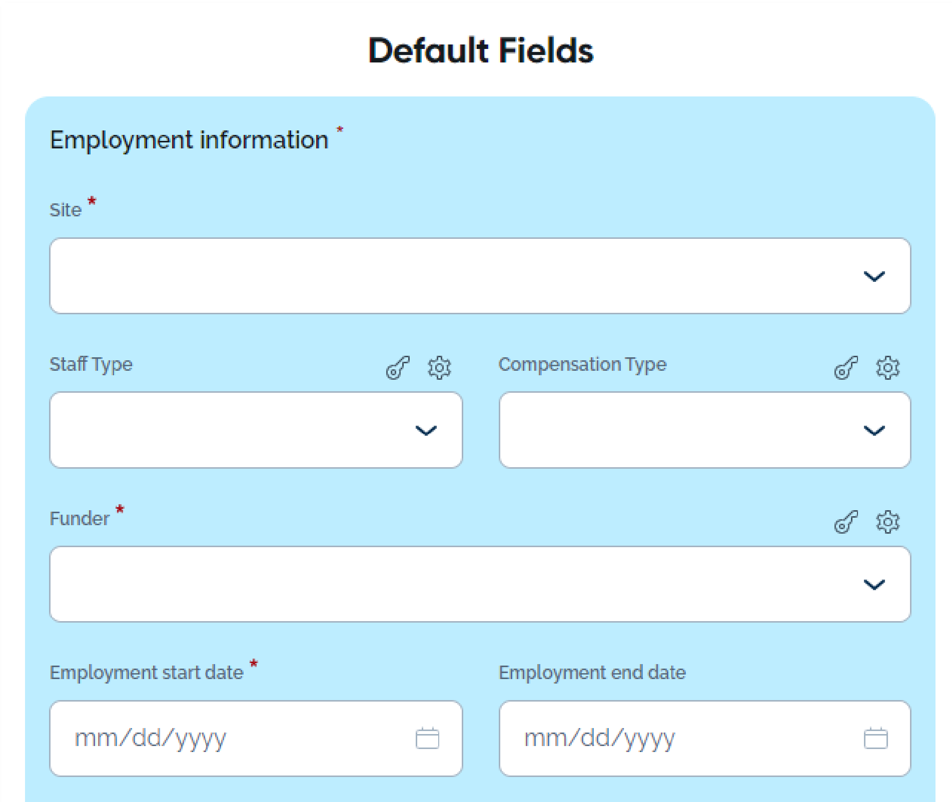

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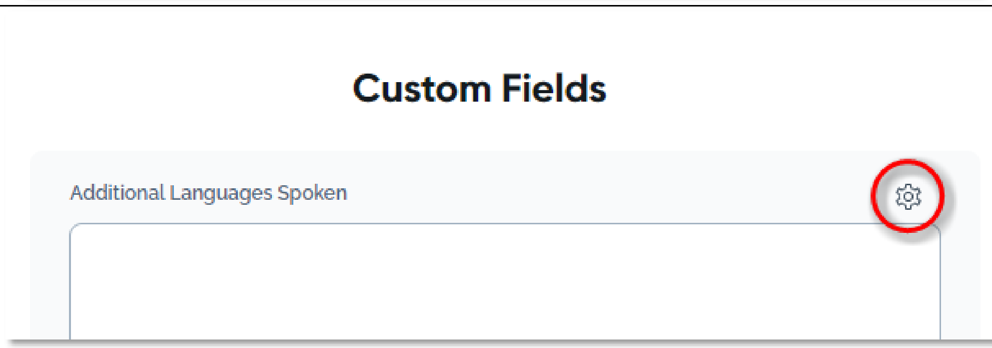

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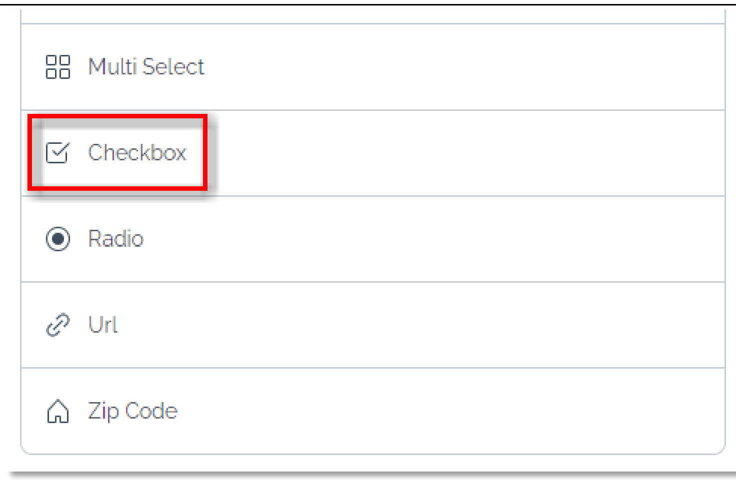
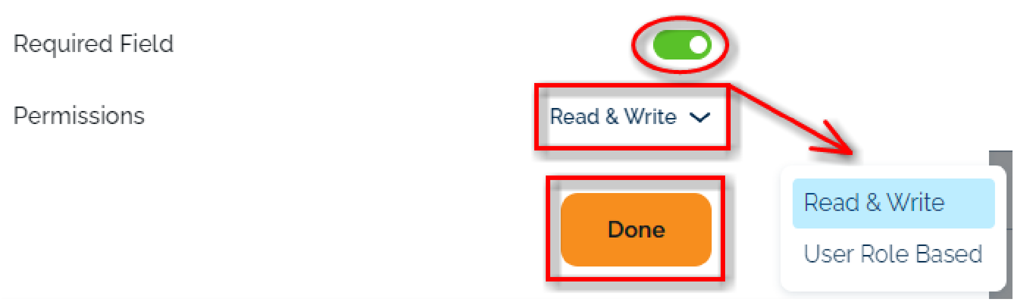
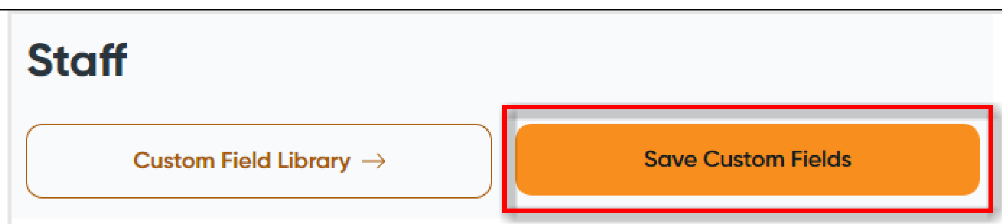
To create a new custom field, click on the custom fields type to the right. To learn more about the custom fields available, [read this article]().	
Fill out the required information for the custom field type selected. Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.	
For all custom fields, you want to determine if it is required. You can also limit access to: *Read & Write: Users can edit the value as needed, regardless of role.* *User Role Based: Define each of the above permissions by role.* Click ***"Done"*** at the bottom of the form to close it.	
To complete the process and add the custom field to the Custom Field Library, click ***"Save changes"*** at the top of the screen.	

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Activities

When creating custom fields for activities, use the drop-down menu to select whether the custom field applies to scheduled, drop-in, or unscheduled activities.

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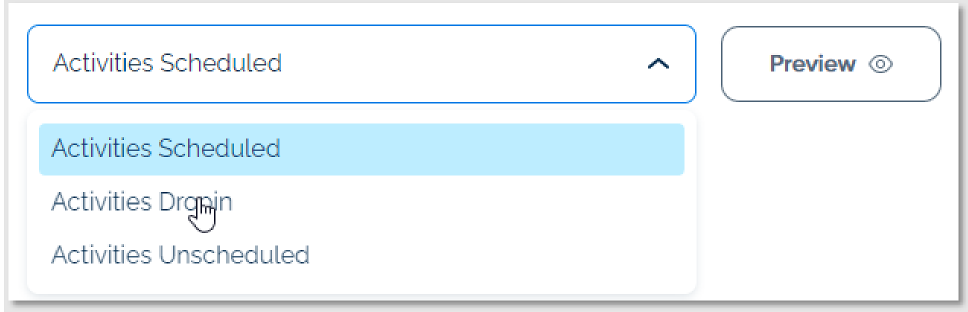

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Custom fields can be set for the activity or the schedule form.

If creating a custom field for unscheduled activities, the schedule form is not an option.

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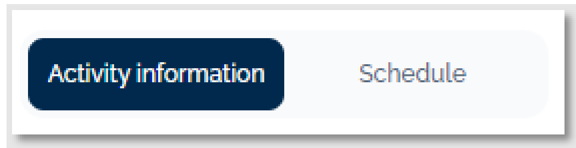

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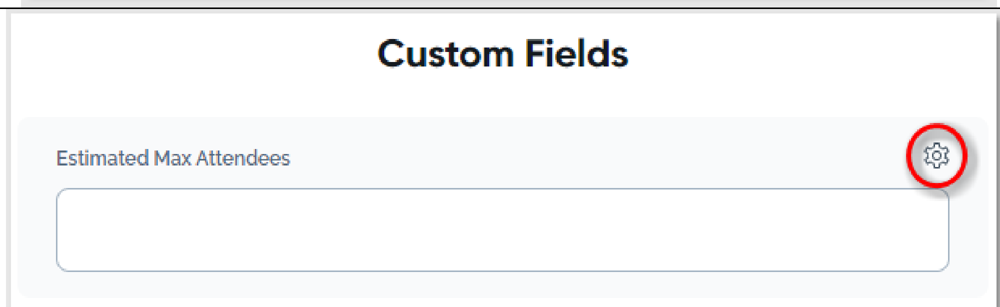

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To learn more about the custom fields available, [read this article](#).

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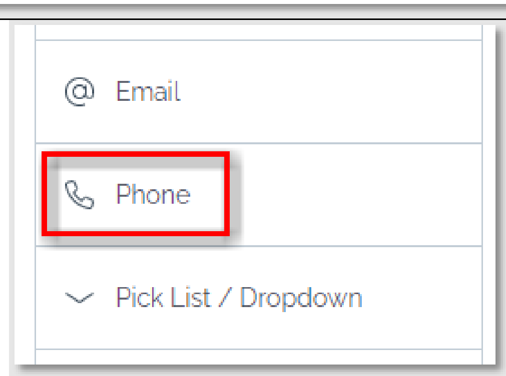

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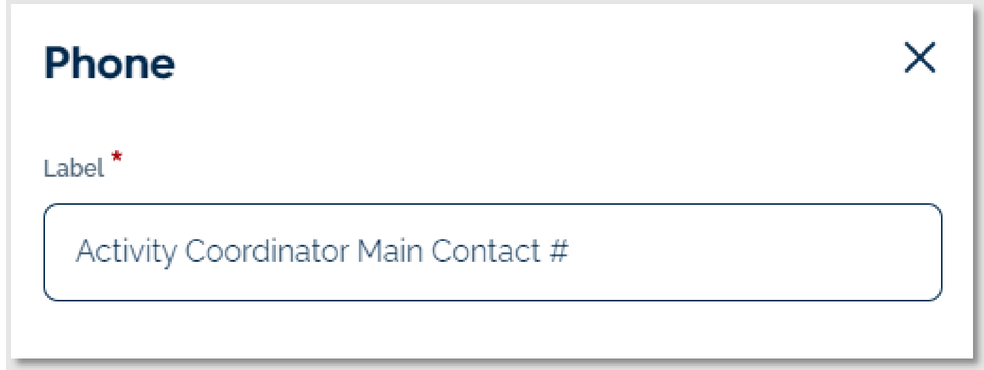
Fill out the required information for the custom field type selected. Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.	
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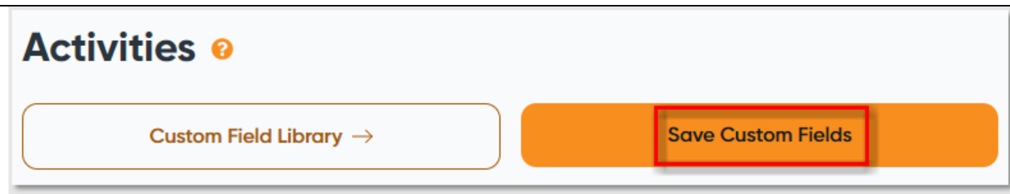
To complete the process and add the custom field to the Custom Field Library, click ***"Save Custom Fields"*** at the top of the screen.	

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Organizations

When creating custom fields for organizations, use the drop-down menu to select the organization level.

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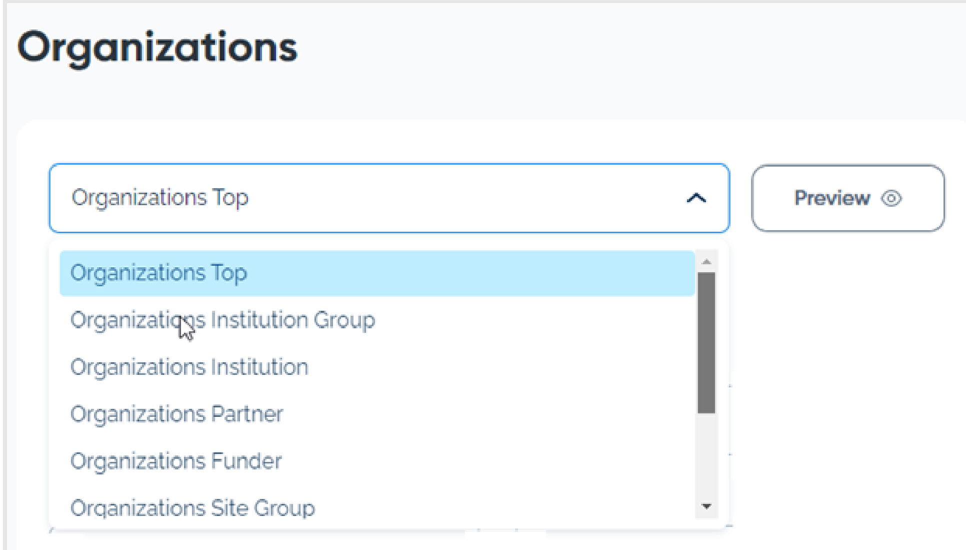

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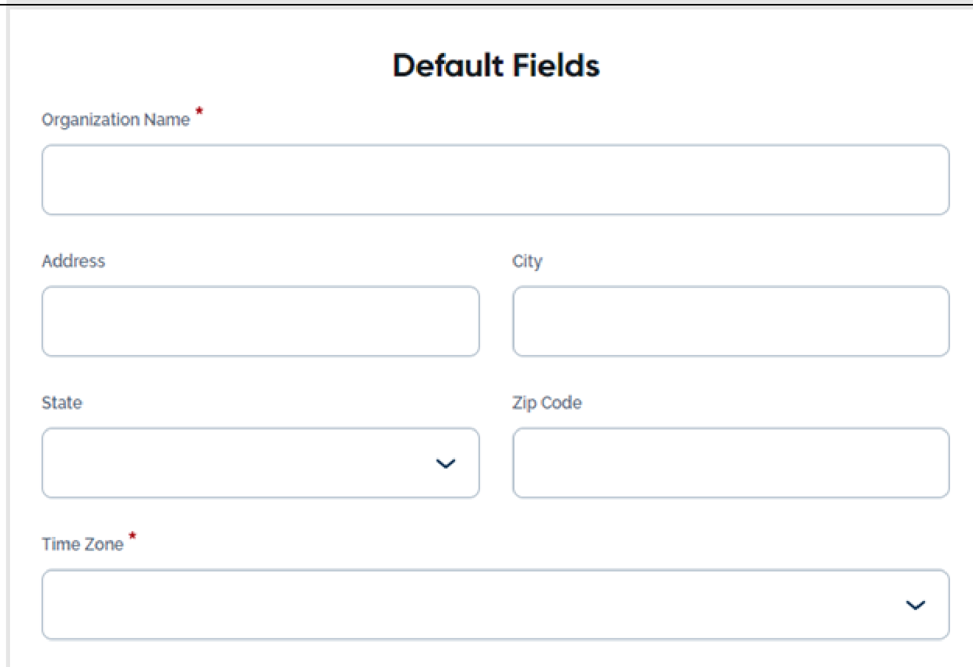

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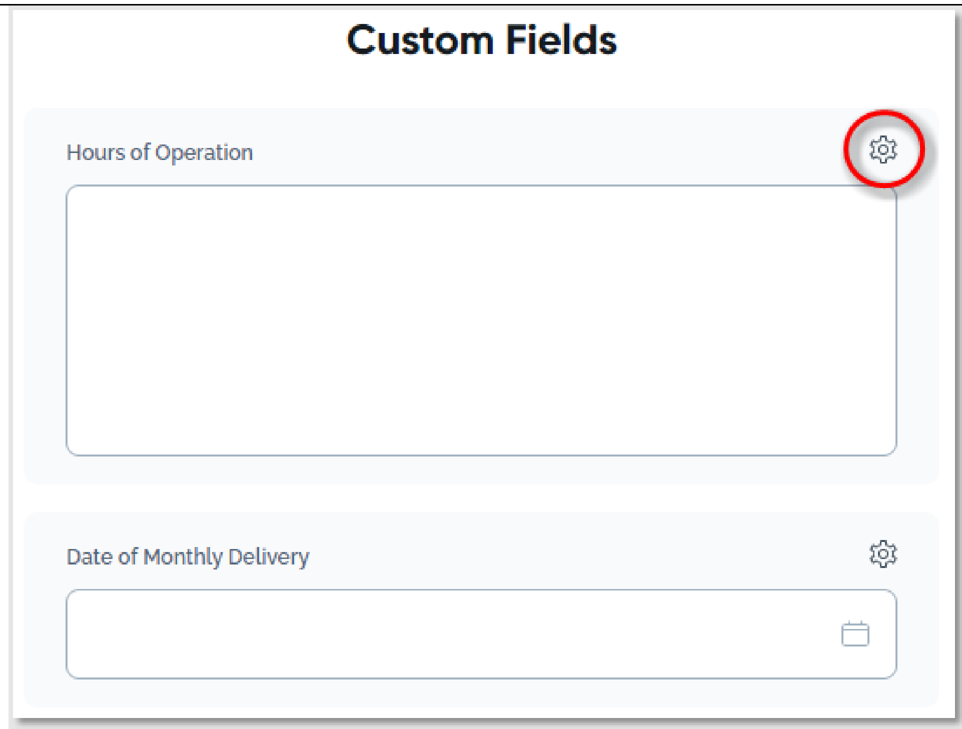
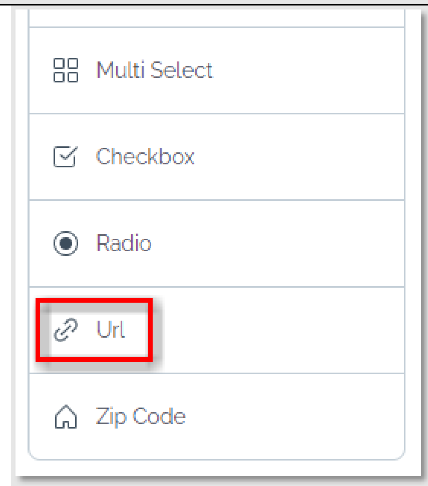
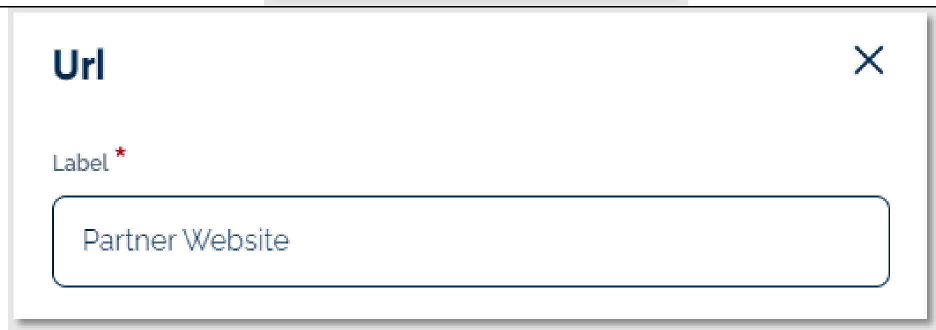
Custom Fields already in use are displayed in the second section. To edit an existing custom field, click the gear button to the right of the custom field name.	
To create a new custom field, click on the custom fields type to the right. To learn more about the custom fields available, [read this article]().	
Fill out the required information for the custom field type selected. Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.	
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