

Mandatory Custom Forms – Help Center

help.fracttal.com/hc/en-us/articles/33708380089101-Mandatory-Custom-Forms

Custom forms in **Fracttal One** allow recording technical information tailored to the specific needs of each organization. With the new functionality, it is now possible to configure them as **mandatory**, ensuring that key data is completed before registering or editing an asset. This improvement contributes to more accurate and consistent information in critical areas such as **locations, equipment, tools, and spare parts and supplies**.

Below is a detailed explanation of the process to configure this functionality and make the most of its benefits.

Steps to create and configure custom forms

You can create a form from scratch or use an existing one, depending on your needs.

Access the desired asset's page, select the **Custom Forms** option, and choose an existing form or click the "+" icon to create a new one.

The screenshot shows the Fracttal One interface for configuring a custom form for a High Pressure Air Compressor (HPC-F1). The interface is divided into a sidebar and a main content area.

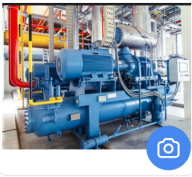
Sidebar:

- Assets Equipment
- General
- Custom Form** (highlighted with a red box)
- Health Status
- Financial
- Third Parties
- Spare Parts and Supplies
- Historical

Main Content Area:


- High Pressure Air Compressor { HPC-F1 } (with a back arrow and a Save button)
- QR code
- Is part of: //
- Désignation: High Pressure Air Compressor
- Code: HPC-F1
- Marque: [Empty field]
- Caractéristiques: [Empty field]
- Serial Number: 01245000
- Extra 1: [Empty field]
- Zone d'influence: [Empty field]
- Barcode: [Empty field]
- Priority: [Empty dropdown]
- Type: [Empty dropdown]
- Group 1: [Empty dropdown]
- Group 2: [Empty dropdown]
- Supplier: [Empty dropdown]
- Purchase date: [Empty field]
- Hours of average daily use: 24:00
- Visible to all:

← High Pressure Air Compressor { HPC-F1 } Save



Out of Service: No
Enabled

Custom Form *



No data to show with these parameters

- General
- Custom Form ←
- Health Status
- Financial
- Third Parties
- Spare Parts and Supplies
- Historical

Next, a side menu will appear with the forms already created (if any) and the option to create a new one "+".

The screenshot shows a mobile application interface for managing equipment. The main screen displays details for a 'High Pressure Air Compressor (HPC-F1)'. A 'Custom Form' tab is selected, showing a list of predefined fields. A modal window is open, providing a preview of the form with the following fields:

- BUs
- Air Compressor
- air conditioner
- Qty
- Formulario personalizado DEFTA

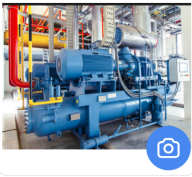
At the bottom right of the modal, there is a blue circular button with a white plus sign, highlighted by a red square. The main screen also shows a 'No data to show' message and a 'Showing 5 of 5' indicator.

A preview of the form will appear in the corresponding tab, showing a summary of the predefined fields.

Edit a custom form

If it is necessary to make changes to the fields already defined in a form, it can be done through the edit icon.

← High Pressure Air Compressor { HPC-F1 } Save



Out of Service: No
Enabled

Custom Form *
Air Compressor ✕ 🔗

Año de puesta en marcha

fecha de compra

color de equipo

Label

Label

Label

Information
You have pending changes to save!

- General
- Custom Form**
- Health Status
- Financial
- Third Parties
- Spare Parts and Supplies

Make the necessary modifications, whether deleting, editing, or adding new fields.

Assets
Equipment

← High Pressure Air Compressor { HPC-F1 }

Out of Service: No
Enabled

General
Custom Form
Health Status
Financial
Third Parties
Spare Parts and Supplies
Historical

Custom Form *
Air Compressor

Year of commissioning
Purchase date
Equipment color
Label
Label
Label
Label

← Air Compressor 6 from 100

Label
Year of commissioning

Label
Purchase date

Label
Equipment color

Label
Label

Label
Label

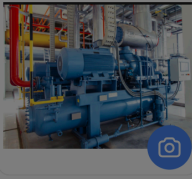
Label
Label

→

To set which of these fields must be mandatory, click on the gear icon corresponding to each label.

Assets
Equipment

← High Pressure Air Compressor { HPC-F1 }



Out of Service: No
Enabled

General
Custom Form
Health Status
Financial
Third Parties
Spare Parts and Supplies

Custom Form *
Air Compressor

Year of commissioning
Purchase date
Equipment color
Label
Label
Label
Label

← Air Compressor 6 from 100

Label
Year of commissioning

Label
Purchase date

Label
Equipment color

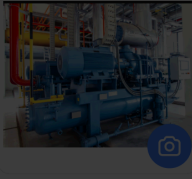
Label
Label

Label
Label

Label
Label

Assets
Equipment

← High Pressure Air Compressor { HPC-F1 }



Out of Service: No
Enabled

General
Custom Form
Health Status
Financial
Third Parties
Spare Parts and Supplies
Historical

Custom Form *
Air Compressor

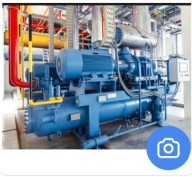
Year of commissioning
Purchase date
Equipment color
Label
Label
Label
Label

← Text Input

Label*
Year of commissioning

Required

← High Pressure Air Compressor { HPC-F1 } Save



Out of Service: No
Enabled

Custom Form *
Air Compressor

Year of commissioning *

Purchase date

Equipment color

Label

Label

Label

Label

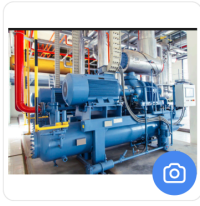
Action Done

Configure Forms as mandatory

It is possible to set the custom form as a mandatory requirement for asset creation in **Fractal One**.

Go to the **Settings** module > **Modules** > **Assets** > and select the asset type to which you want to assign the form as mandatory.

← High Pressure Air Compressor { HPC-F1 }



Out of Service: No
Enabled

- General
- Custom Form**
- Health Status
- Financial
- Third Parties
- Spare Parts and Supplies
- Historical

Custom Form *

Air Compressor

Year of commissioning *

Purchase date

Equipment color

Label

Label

Label

Jonas Campos



Settings

Language >

Dark Mode

Help and Technical Support v

Change company

Log out

Save

Information
You have pending changes to save!

- General
- User Accounts
- Business Calendar
- Modules**
- Financial
- Auxiliary Catalogs
- Document Management
- Transactions Log
- Security
- API Connections
- Guest Portal
- Account

Locations Equipment **Tools** Spare Parts

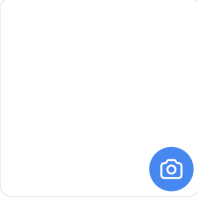
Set which of the following fields must be mandatory

| Options | Required | Options | Required |
|------------------------------|-------------------------------------|----------------|--------------------------|
| Unit | <input checked="" type="checkbox"/> | Type | <input type="checkbox"/> |
| Name | <input checked="" type="checkbox"/> | Group 1 | <input type="checkbox"/> |
| Code | <input type="checkbox"/> | Group 2 | <input type="checkbox"/> |
| Part Number | <input type="checkbox"/> | Barcode | <input type="checkbox"/> |
| Make | <input type="checkbox"/> | Notes | <input type="checkbox"/> |
| Model | <input type="checkbox"/> | Cost center | <input type="checkbox"/> |
| Extra 1 | <input type="checkbox"/> | Visible to all | <input type="checkbox"/> |
| Extra 2 | <input type="checkbox"/> | Serial Control | <input type="checkbox"/> |
| Limit Acces to this location | <input type="checkbox"/> | | |

Mark Custom Form as mandatory

Note: When creating or modifying assets of the configured types, it will be essential to complete the custom forms defined as mandatory. If the required fields are not completed, it will not be possible to finish the process.

Save


Out of Service: No
Enabled

Required Information


- Name is too short (the minimum is 2 characters)
- Name can't be blank
- Unit can't be blank
- Custom Form can't be blank

General

Custom Form

Warehouses

Third Parties



Name is too short (the minimum is 2 characters)

Unit can't be blank

0

0

Visible to all

Serial Control

Please note that the fields to be completed when creating or editing an asset can be configured as mandatory or not, according to the organization's needs.

For more information on asset configuration and their custom forms, please see the following article: [Assets](#)