Mandatory custom forms

help.fracttal.com/hc/change_language/en-us

Custom Forms in Fracttal One are an essential tool for recording specific technical information tailored to each organization's needs. Now, with the new functionality, it is possible to configure them as mandatory, ensuring that key data is completed before registering or editing an asset. This improves the quality and consistency of information in critical categories such as 'Locations,' 'Equipment,' 'Tools,' and 'Spare Parts and Supplies.'

Below is a step-by-step guide on how to configure this functionality to make the most of its benefits.

STEPS TO CREATE AND CONFIGURE MANDATORY CUSTOM FORMS

1. Create a 'Custom Form'

- To create a custom form, you must create a new asset or use an existing one.
- Access the asset > Custom Forms > select an existing form or click "+" to create a new one.

Assets Tree View		Old Version 🕤 😺 🔗 📳 🔍 -
← Aire Acondicionado		Save
Out of Service: No Enabled	Is part of // Nombre Aire Acondicionado Fabricante Numero de Serie CODIGO DE P	Code EQ.PS-1000
6 General	PERTENCIA Barcode	Priority
Eustom Form	Type Group 1	Group 2 v
§ Financial 82 Third Parties	Supplier	Purchase date
Spare Parts and Supplies	Hours of average daily use	○ Visible to all
S Historical	Zer.vo	
Attachments		

Assets Tree View	Old Version 🕤 🥔 😰 🛛 🔍 -
Aire Acondicionado	Save
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General	6
😽 Health Status	
Financial	No data to show with these parameters
🝪 Third Parties	
🔀 Spare Parts and Supplies	
S Historical	
Attachments	

Then, select it and save it for the asset.

Equipment		3 🖉 🖉 🗖 🗸
Aire Acondicionado (EQ.PS-1000)		Save
Out of Service: No Enabled	Custom Form * CARACTERISTICAS DE AIRES ACONDICIONADOS	~ X 8
🕞 General		
E Custom Form		
🔂 Health Status		
(\$) Financial		
🐯 Third Parties		
🔀 Spare Parts and Supplies		
S Historical		
Attachments		

Click the icon to edit the form.

Equipment		A ×
Aire Acondicionado { EQ.PS-1000 }		Save
Out of Service: No Enabled	Custom Form* CARACTERISTICAS DE AIRES ACONDICIONADOS	
🕞 General		
E Custom Form		
Health Status		
(§) Financial		
ogen Third Parties		
🔀 Spare Parts and Supplies		
S Historical		
Attachments		

Add all required fields.

Equipment		← CARACTERISTICAS DE AIRES ACONDICIO (5)
Aire Acondicionado { EQ.PS-1000 }		4 from 100
	Custom Form * CARACTERISTICAS DE AIRES ACONDICIONADOS	
	BTU	
Out of Service: No	VOLTAJE	
Enabled	PESO -	Label ⊞ FECHA DE PUESTA EN MARCHA ✓ 🔅 🖀 👪
Information You have pending changes to save!	- FECHA DE PUESTA EN MARCHA	
General		
Sustom Form		
Health Status		
(§) Financial		
జ్రికి Third Parties		
🎇 Spare Parts and Supplies		

Define which of these fields must be filled in as mandatory. To do this, click the gear icon for each label.

Equipment		← CARACTERISTICAS DE AIRES ACONDICIO		6)
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양 Third Parties ※ Spare Parts and Supplies					
Assets Tree View		← Entrada de texto		6)
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Information You have pending changes to save!	FECHA DE PUESTA EN MARCHA 2025-02-06				
 General Custom Form Health Status Financial Third Parties Spare Parts and Supplies 					

Equipment		3 S DA -
Aire Acondicionado { EQ.PS-1000 }		Save
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Information You have pending changes to save!	FECHA DE PUESTA EN MARCHA	
GeneralGustom Form		
Health Status		
(૬) Financial 왏 Third Parties		
🔀 Spare Parts and Supplies		

2. Configure 'Custom Forms' for Asset Types

Go to the Settings module > Modules > Assets, and for each asset type, select whether 'Custom Forms' should be mandatory.

Equipment		B S D ·
← Aire Acondicionado { EQ.PS-1000 }		DA DIEGO ANDRES VERGA diego.vergara@nefosco Base Ejemplo Fracttal C
Out of Service: No Enabled	Custom Form *CARACTERISTICAS DE AIRES ACONDICIONADOS BTU 12000 VOLTAJE PESO	Settings What's new? Language → Dark Mode Help and Technical Support → C→ Log out
GeneralGustom Form	FECHA DE PUESTA EN MARCHA	
😽 Health Status		
(§) Financial		
😽 Third Parties		
🎇 Spare Parts and Supplies		
S Historical		
Attachments		

Settings



Base Ejemplo Fracttal Consulting				Save
n General	Type Assets			~
C User Accounts	LOCATIONS	EQUIPMENT	TOOLS	SPARE PARTS
🛗 Business Calendar			-	
š <u>≕</u> Modules	Set which of the following fiel	ds must be mandatory		
Financial	Options	Required	Options	Required
Auxiliary Catalogs	Nombre	O	Group 1	0
	Code	O	Group 2	0
	Fabricante	0	Barcode	0
8 Transactions Log	Modelo	0	Notes	0
G Security	Número de Serial	0	Priority	0
🧔 API Connections	Torre	0	Visible to all	0
😈 Guest Portal	Piso (SERVICIO)	•	Purchase date	0
Account	Is part of	0	Hours of average daily use	0
	Туре	0		

≡ Settings				🕫 🔗 🚺 ~
Base Ejemplo Fracttal Consulting				
General	LOCATIONS	EQUIPMENT	TOOLS	SPARE PARTS
Octoper Accounts	Set which of the following t	fields must be mandatory		
Business Calendar	Options	Required	Options	Required
ģ <u>≕</u> Modules	Nombre	0	Group 1	0
Sinancial	Code	0	Group 2	0
Auxiliary Catalogs	Fabricante	0	Barcode	0
Document Management	Modelo	0	Notes	0
Transactions Log	Número de Serial	0	Priority	0
G Security	Torre	0	Visible to all	0
🔞 API Connections	Piso (SERVICIO)	0	Purchase date	0
😈 Guest Portal	Is part of	0	Hours of average daily use	0
(2) Account	Туре	0		
	Mark Custom Form as mand	atory	C	

Note:

When creating or editing assets of the configured types, completing the designated mandatory custom forms will be required. If the mandatory fields are not completed, it will not be possible to finalize the process.

Equipment					B	8 DA ~
← •						Save
Out of Service: No Enabled	Pabricante Número de Serial	Is part of		Modelo	EQ.PS-1000	
Required Information Custom Form can't be blank	Piso (SERVICIO)		Barcode		Priority	~
G General	_ Туре	~	- Group 1	~	Group 2	~
😸 Custom Form	Supplier			Ý	Purchase date	
(\$) Financial	Hours of average daily use – 24:00				Visible to all	
ᇮ Third Parties 淡 Spare Parts and Supplies	Planned Maintenance —					

Keep in mind that the fields required when creating or editing an asset can be set as mandatory or not, depending on the organization's needs. For more information on asset configuration and custom forms, refer to the following article: <u>Fracttal One Help - Assets</u>.